

Getting started with CU Succeed

Log in to CU Succeed

1. Go to [CU Succeed](#)
2. Click the “Login” button and enter your SSO and DUO credentials

Set up your CU Succeed profile and preferences

Review and update your contact information, and set baseline preferences for appointments and email from CU Succeed.

Navigate to your Profile

1. Log in to CU Succeed
2. Go to your **Profile** by
 - a. Clicking the triple bar or "hamburger" icon in the upper left
 - b. Then click on your name



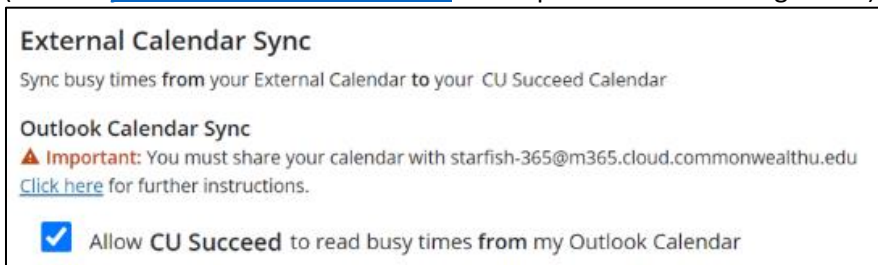
Update your Institutional Information

All CU Succeed users should update contact information, regardless of how much or little they intend to use CU Succeed. Your contact information is visible to students who have a connection to you through a CU Succeed role.

1. Select the **Edit Profile** tab.
2. Click **Upload Photo** to add or change a photo.
3. Choose your **Preferred Login Page**, the page that you will see directly upon logging in. We recommend choosing **Students → My Students** or **Students → Tracking**.
4. Change your **Title** so that it clearly identifies your role and department to students (e.g. Professor – Department of Exceptionality Programs). Only students will see this title. Other faculty and staff users will see your CU Succeed Connections to a particular student, instead.
5. Add information to the **My Biography** section. What are your areas of expertise that are relevant to students who might talk with you?
6. Add information to the **General Overview** section. Use this section to add a friendly introduction and to indicate how you can help students.

Select your Appointment Preferences

1. From your profile, select the **Appointment Preferences** tab.
2. Set your **Office Hour Defaults**. If you want to let students schedule their own appointments with you, set a scheduling deadline for them if you want one (e.g., by 5:00 pm the day before).
3. Under **Calendar Sync**:
 - a. Select if you would like changes sent to your external calendar.
 - b. Sync busy times from your external calendar by checking the “**Allow CU Succeed to read busy times...**” checkbox. Use the **Click here** link for instructions based on which calendar application you are using. (Contact jheid@commonwealthu.edu for help with calendar integration.)



4. Under **My Locations**, add your office address and possibly a Zoom or phone option. At least one location *must* be added to be able to schedule appointments.

5. If you would like someone else to be able to add student appointments to your calendar, add a **Calendar Manager**. You can select any other CU Succeed user. It is recommended that you add your unit's support staff person.
6. Click **SAVE CHANGES** to save your information.

Select your Email and Calendar Preferences

1. From your profile, select the **Notifications** tab.
2. Under **Text Notifications**, add a cell phone number if you would like to receive alerts by text.
3. Under **Preferences**:
 - a. Tell CU Succeed when it's OK to send you emails about your upcoming appointments.
 - b. Select **summary email** frequency for tracking items and appointment activity.
 - c. Select your **tracking item notification** preferences.

Define your availability to students

Scheduled meetings can be one less thing for you to manage, and assures students that you have time for them. For students to schedule their own appointments with you, you must make appointments available to students using one of the options detailed below.

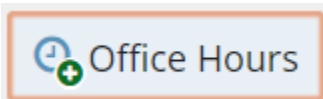
Once you create this availability, students with a connection to you can see your open appointment times, and select the appointment that fits their schedule. **Students can only see times that are available.**

Decision point: Are you only allowing walk-ins? If yes, use Method A. If no, are the times you would offer to students regularly recurring? If yes, use Method A. If no, use Method B.

Method A: Add Office Hours Button: Walk-in and Regularly Recurring Meeting Blocks

Use to add walk-in hours or use when availability recurs in a repeating pattern that rarely or never changes.

1. Click the **hamburger** icon.
2. Click **Home** or **Appointments**.
3. Click the **Office Hours** button on your CU Succeed **Home page** or **Appointments page** to open the **Add Office Hour** form.




4. **Enter a Title (name)** for this block of time. Students will see this name when they view your calendar. The title will also help you or others managing your calendar identify different types of office hours.
5. Select **What day(s)** and **indicate any recurrence** (e.g. Repeats every 1 week).
6. Use the **What time** fields to enter the start and end time for the office hours.
 - o **NOTE:** Once this office hour block is saved, you will not be able to edit the days on which the office hours occur or the type of frequency (e.g. weekly) but you will be able to edit how often the block recurs (e.g. 1 week vs. 2 weeks) and the specific times available.
7. Select **Where** meetings will be held using the checkbox(es) next to your location(s).
 - o If you choose more than one location, the student will be able to choose his/her preferred location for the meeting.
8. Select the **Office Hour Type** for meetings you will hold during this block.
 - o Select **Scheduled and Drop-ins** if you will be using the kiosk/waiting room features, and you plan to take drop-ins between appointments.
 - o Select **Scheduled Appointments Only** if you will not take any drop-ins between scheduled appointments.

- Select **Drop-ins Only** to show the time as available to students, but disallow anyone from making advance appointments.
- 9. Select **How long** meetings can be by selecting a minimum and maximum duration. *If you do not want students to select the appointment duration, choose the same value for minimum and maximum.*
- 10. Select the **Appointment Type** you will use for this block of availability. Appointment Types dictate:
 - which students can schedule during this time (based on the role that connects you),
 - the appointment reasons shown to students,
 - which SpeedNotes will display, and
 - which roles can view the appointment and its notes.
- 11. Use the **Instructions box** to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow drop-ins.
- 12. Click the **Start/End Date tab** to set a time frame for a repeating office hour block, and select an **End Date** for the block. For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.
 - **NOTE:** If you do not set an end date, it will default to **Never**.
- 13. Click the **Submit** button to save your Office Hour block.

Need to Edit or Cancel office hours?

After setting your **initial Office Hours** in CU Succeed, as your availability changes, you may need to adjust, or even cancel, your original Office Hour blocks. You may **edit or cancel those Office Hours** as follows:

1. Select **Appointments** from the main menu.
2. Select the **Agenda tab** of your CU Succeed Calendar and locate the Office Hour Block you would like to modify.
3. Open the **Office Hours pop-up card** by hovering over the **Office Hours icon**  to the left of the Office Hour block title.
4. Select **Edit** from the Office Hours pop-up card to edit an existing block.
5. You cannot modify the "What Day(s)" settings, but you can modify the **frequency** of recurrence, **start and end times, locations, durations, appointment types, instructions** and overall **start/end dates** for the meeting series.
6. To **cancel** an occurrence of the Office Hour block, select the **arrow** on the Cancel button, and from the Cancel menu, select "**Just this one.**"
7. To **cancel all occurrences** of the Office Hour block, select the **arrow** on the Cancel button, and from the Cancel menu, select "**The entire series.**"
8. **Update** the desired fields and click **Submit**.
 - **NOTE:** If you need to update or edit your **locations**, please navigate to the Hamburger Menu > Your Name > Appointment Preferences.

Method B: Scheduling Wizard: Non-Recurring, Non-Patterned Appointment Blocks

Ideal when availability needs to fit around other calendar items in a non-patterned way. This method allows you to create multiple, separate blocks of availability, and easily cancel or modify only specific blocks if needed.

Note: This method will only allow you to set up availability for scheduled meetings. Use Method A: Add Office Hours button to create Drop-in availability (see instructions in the previous section).

1. Click the **Scheduling Wizard** button from your CU Succeed **Home page** or **Appointments page**.
2. **Enter** the Title, location (Where?), duration (How long?), Appointment Types and Instructions that should be applied to all of the office hour blocks that are to be created.
 - **NOTE:** Choose the same minimum and maximum appointment length, such as 15 minutes.
3. Click the **Next** button.

- The date and time page of the wizard is displayed using a Monday through Friday grid for the current week. The date range is displayed in the top right corner of the grid.
- Use the < > controls to the right of the date range to **navigate to the week in which you want to begin scheduling** the office hours.
- In the selected week, **enter the start and end times for each block** in the appropriate day columns. You can schedule multiple office hour blocks on any day within the week.
- If you need to schedule more than three blocks on any day, select the **“Add Another Block”** link in the column for that day.
- To add blocks to another week, use the < > controls to move to the next week and repeat until you have entered all of the blocks you wish to add at this time.
- Click the **Finish** button to create all of the office hour blocks.
- A **summary** is presented that includes a list of hours that could not be created due to conflicts between the blocks you specified and existing calendar items. Make a note of failed blocks before clicking **Finish** to exit the wizard.

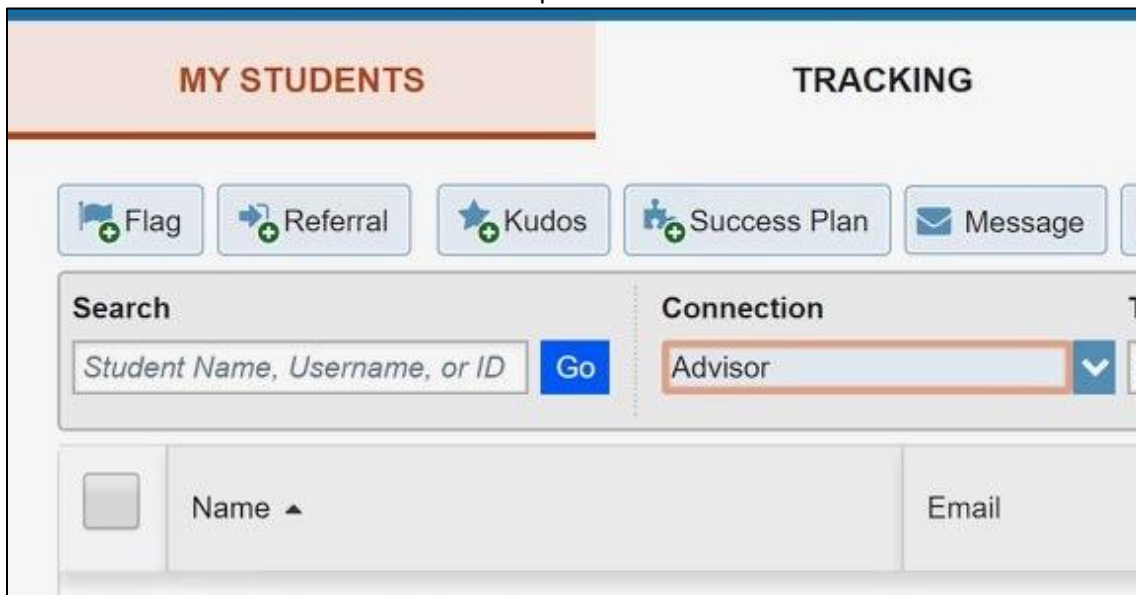
Scheduling a Single Appointment

- Click the **Appointment** button, search for the student, and select the appointment day, time, and reason.
- Receive the .ical to your **external calendar**.
- Student receives an appointment notification **email** to their CU account.

How to document outreach to students

Find your students:

- Go to the **Students** tab under the hamburger icon.
- Make sure you’re on the **My Students** tab.
- Choose the **Connection** from the drop-down menu.



- Click the **check box** to select a student. You can select all on a page by clicking the check box next to **Name** in the header.
- Decide** whether someone else needs to know you sent this message to students.
 - If **No**, no one else needs to know, choose **Message**. This sends a BCC email to each of the selected students that **only you** can see in their CU Succeed folders.
 - If **YES**, someone else does need to know, choose **Note**. This sends a BCC email to each of the selected students and records the note in each of the student’s CU Succeed folders, visible to those with viewing permission for notes.

6. If adding a message visible to others, click the **Note** button.
7. Select **General Shared Note** from the Note Type menu.
8. Add a **subject line**, just as you would when writing an email.
9. Type the **body** of the message, just as you would when writing an email.
10. Check the **Send copy of note to student** checkbox if you want the student to receive it.
11. Click **Submit**.

Bonus: When using CU Succeed to send emails to students, you can see when the message was sent and when it was viewed.

Documenting meetings with students

Keeping brief, accurate summaries of your meetings with students is important. It is both an ethical obligation of advising and a time saver for you in the long run. Documentation in CU Succeed aids:

- Collaboration and consistency between different people who interact with students
- Allows us to help students without relying solely on students to translate instructions/needs
- Helps us correct errors that we make (because we do, and will, but not on purpose)
- Helps us hold students accountable

What should and shouldn't I document? Use this guide:

- If you recommended that the student do something, summarize that recommendation.
- When sharing information about the student, share information that others should know in order to better help the student. For example, if the student aspires for a particular career path, note that so others can also help if the occasion arises.
- Ask yourself, "Am I documenting my judgment, or stating a fact?". Just state the facts.
- Do not "out" the student on private matters or health diagnoses. If a big issue is relevant to their academic progress, use general language, but omit the details.
- Above all, remember that these notes are part of a student's FERPA rights.

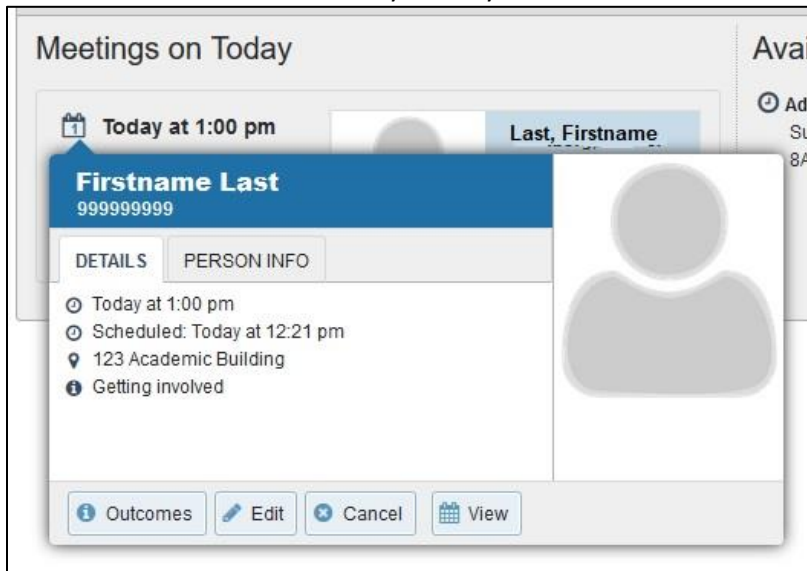
NOTE: See more **Note Taking Guidelines** on the CU Succeed webpage.

How to document meetings

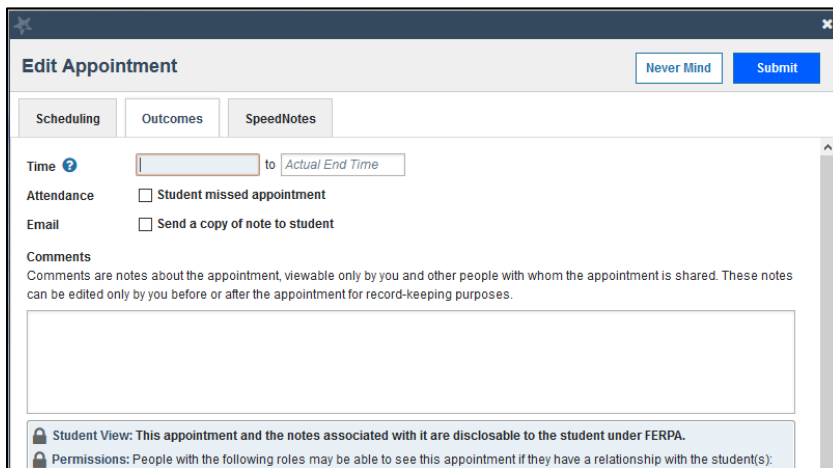
1. Log in to CU Succeed
2. Your scheduled meetings are visible in several places in CU Succeed:
 - a. The **Appointments box** on your Dashboard (home screen).
 - b. In the **Appointments** section:
 - i. Click the hamburger icon and click on the **Appointments** section
 1. Agenda view (pictured below)
 2. Daily view
 3. Weekly view



3. Hover over the **calendar icon** anywhere you find it.



4. Click **Outcomes**



5. Type your comments in the **Comments** box.
6. Check the appropriate **SpeedNotes** on that particular tab. These will be specific to the Appointment Type selected.
7. Click **Submit**.

Getting information out of CU Succeed

Filters allow you to find students who meet particular criteria. For example:

- Find students who haven't met with you yet
- Find students who have flags that haven't been addressed

1. Go to the **Students** tab under the hamburger icon.
2. Make sure you're on the **My Students** tab.
3. Choose the **Connection** from the drop-down menu.
4. Click the **Add Filters** button.
5. **Select** the desired filtering criteria from the dialog box.
 - **NOTE:** This is an AND filter, so it will return results for students who fit ALL of your selected criteria.

6. Your list of students shortens to only the students who fit your selected filtering criteria.

Example 1: Find students who have not yet scheduled an appointment with you:

- Click the **Add Filters** button.
- Choose the **Meetings** tab.
- Check the **Students** box.
- Click the radio button for students **Who have not had/scheduled meetings**. (Conversely, if you need to report how many students HAVE met with you, choose the other radio button).
- Choose the **Appointment Type** and check the boxes for its associated **reasons**.
- Select **Start** and **End dates**.
 - Click **Submit**.

Additional Filters

Clear All Filters Never Mind Submit

Tracking Items

Cohorts & Relationships

Meetings

Success Plans

Attributes

Students

Who have had/scheduled meetings

Who have not had/scheduled meetings

Appointment Type / Reason: Advising for assigned advisees > 1. Talk about my class

Filter: Enter text to filter results

Dates

Advising for assigned advisees

Advising for assigned advisees > 1. Talk about my...

Advising for assigned advisees > 2. Talk about m...

Advising for assigned advisees > 3. Help with a U...

Advising for assigned advisees > 4. Trouble with ...

Advising for assigned advisees > 5. Engagement ...

Advising for assigned advisees > 6. Graduation or...

Advising for assigned advisees > 7. Other (please...

College Enrichment Advising

1. Experiences abroad

2. Career exploration

3. Resume or coverletter

* Required fields

Clear All Filters Never Mind Submit

Example 2: Find students who have flags that haven't been addressed:

- Click the **Add Filters** button.
- Choose the **Tracking Items** tab.
- Select **Active**.
- Select tracking type: **Flag**
- If you want to see flags you raised, select **Me**. If you want to see flags raised by all instructors, choose Role: **Instructor**
- Set **beginning** and **end dates**.
- Click **Submit**.

Additional Filters

Clear All Filters Never Mind Submit

Tracking Items

Cohorts & Relationships

Meetings

Success Plans

Attributes

Students with Tracking Items

Count: Tracking Items matching criteria

Status: Active Resolved Both

Tracking Type: Flag

Closure Reason:

Item Name:

Created By: Anyone Me Role: Instructor

Course Context:

Due Date:

Creation Date: 08-27-2018 to 09-14-2018

* Required fields

Clear All Filters Never Mind Submit

Progress reporting

At critical times of the year, Instructors are encouraged to report progress for two reasons:

- Help students assess where they stand in your course and whether or not they need to make changes in order to be successful in the course.
- Help others find students who are in trouble across multiple courses so they can offer help.

The reporting campaign creates a **progress report survey**, which packages a subset of Flags and Kudos, but instructors can use any of the available CU Succeed methods to provide feedback to students.

There are two ways to alert students using Flags and Kudos:

- Complete a progress survey** – Most intuitive for large classes. If you use the manual method below, simply click the Submit button on the survey to stop automated reminder emails.
- Manually raise Flags or Kudos** – Use if a progress survey is not available (e.g., submitted the survey too soon, or want to provide feedback outside of a reporting campaign period).

IMPORTANT NOTE: A **No Show progress survey** is opened once per semester (or summer session) per class at the end of the add/drop period. The No Show Flag is **only** available within the No Show progress survey, not as an individual flag. You are encouraged to submit these surveys as they have replaced the previous method of collecting such data by the Registrar's Office. The new process alleviates the need for you to look up names and student IDs. *Even if you have nobody to report as a "no show" during the add/drop period, please submit the survey.*

NOTE: Step-by-step instructions for completing a progress survey are available in the **Progress Survey Tutorial** on the Starfish webpage.

Most Flags and Kudos are available for use at any time of the semester. When raised, each Flag or Kudo may generate an email message to the student and/or the student's advisor using the template language. Any comments you choose to add are included in this email. All **message templates** are available on the CU Succeed webpage.

How we choose to use the tool gives us a chance to call students and others to action. When a student talks with someone about the issue raised, that person will hopefully close the loop and let the instructor or pertinent role know. This doesn't mean the problem was solved, but it does mean the flag was successful in getting someone's attention and in causing an action.

Thank you for your continued support in our students' success!