SUNY WESTCHESTER COMMUNITY COLLEGE

VIKING SUCCESS

Faculty & Staff Guidebook

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GETTING STARTED

Signing In

via the short link

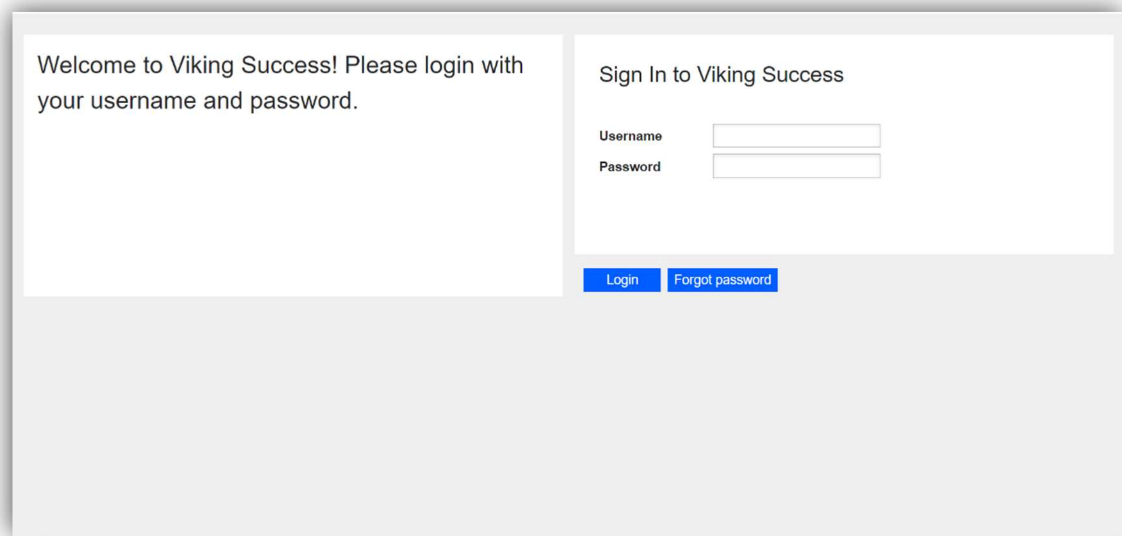
www.sunywcc.edu/vikingsuccess

via the resource page

www.sunywcc.edu/academics/viking-success

or via the MyWCC tile

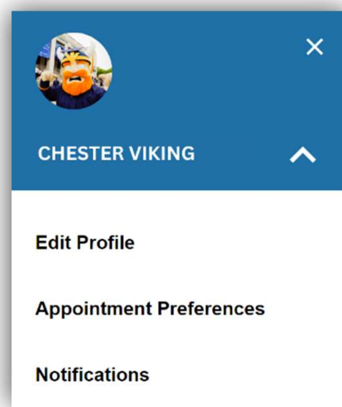
Once you arrive at the landing page, you can log in using your SUNY Westchester username and password.



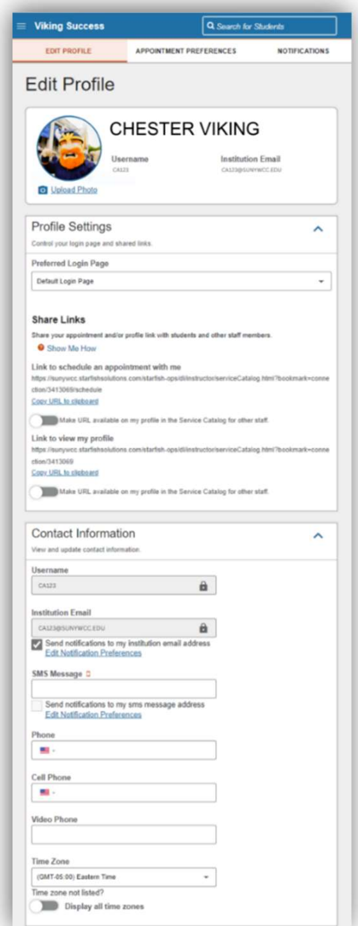
The first time you log in to the Viking Success the platform will open the **Office Hours Setup Wizard**. You may close this and use the **Add Office Hours** function later.

Edit Profile

Profile Settings



1. Click on your name at the top of the navigation menu (indicated by the ≡ icon) and select the **Edit Profile** tab.
2. Help students put a face to your name by using the **Upload Photo** link beneath your existing photo or placeholder to upload a photo. Browse to a photo file (.jpg, .png, or .gif), and then click the **Upload Now** button to update your photo.
3. Select your **Preferred Login Page** from the dropdown. This is the page that will open after logging in.
4. Toggle the **Share Links** option(s) if you would like to share your appointment scheduling and/or profile link with students and staff.
    a. **Sharing with students:** Copy the URL(s) to the clipboard. You can paste the URL(s) in emails, email signatures, Brightspace, any non-Viking Success page, etc.
    b. **Sharing with staff**: Select the appropriate checkbox(es) to display the URL(s) on your Connection Profile in the Services tab.



Contact Information

5. **Username**
    a. This field is pre-populated in Viking Success and cannot be edited.
6. **Institutional Email**
    a. This field is pre-populated in Viking Success and cannot be edited.
    b. Select the **Send notifications to my institution email address** checkbox to receive notifications related to the status of your raised tracking items, as well as appointment requests and messages from students.

7. **Phone**
    a. If you have a campus phone number, you may list it. If you do not, please leave this blank.
8. **Cell Phone**
    a. Please leave this blank. SUNY Westchester is not currently using the SMS notification functionality.
9. **Video Phone**
    a. If you use Zoom to meet with students, you may list your Personal Meeting Room link here.
10. **Time Zone**
    a. The time zone will default to GMT-5 Eastern Standard Time (EST). It is advisable to leave this on its default so students can see the correct times if scheduling an appointment with you.

Please Note:

SUNY Westchester policy states that Faculty & Staff must communicate with students through official college channels. Please keep this in mind when listing your contact information.

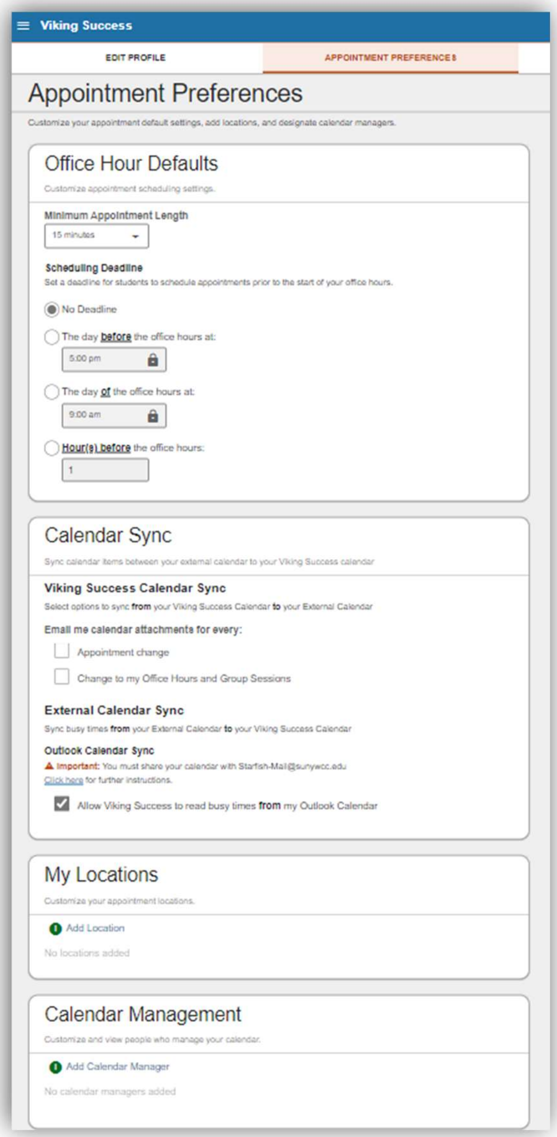
About

11. **Title**
    a. Please enter your functional title in the Title field. This section displays to students to help them identify your services.
12. **My Biography**
    a. A brief biography can help students get to know you. Tell students about your educational background, areas of research, or other information about your expertise.
13. **General Overview**
    a. Tell students what help you offer during office hours and/or directions to your office.

Save Changes when finished!

Appointment Preferences

Here you can customize your default **Appointment** and **Office Hour** settings, add, or remove virtual and physical **Locations**, and designate other users as **Calendar Managers** from the **Appointment Preferences** tab.



Office Hour Defaults

1. **Minimum Appointment Length**
   a. Select the appropriate minimum appointment length that students should be able to make.
2. **Scheduling Deadline**
   a. Select the latest time or date that a student can schedule appointments or select **No Deadline**.

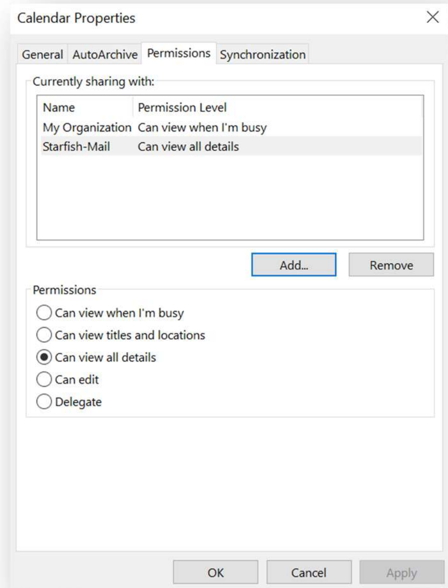
Calendar Sync

3. **Viking Success Calendar Sync**
   a. Select the appropriate option to sync from your Viking Success calendar to your external calendar:
   b. **Appointment Change**
      i. When selected, you will receive calendar attachments for appointment changes from your Starfish calendar to your external calendar.
   c. **Change to my Office Hours and Group Sessions**
      ii. When selected, you will receive calendar attachments for changes to your **Office Hours** and **Group Sessions** from your Starfish calendar to your external calendar.
4. **External Calendar Sync**
   a. Sync busy times from your Outlook calendar to your Viking Success calendar by selecting **Allow Viking Success to read busy times from my Outlook Calendar**.

b. Follow the below instructions to complete calendar sharing through Outlook.

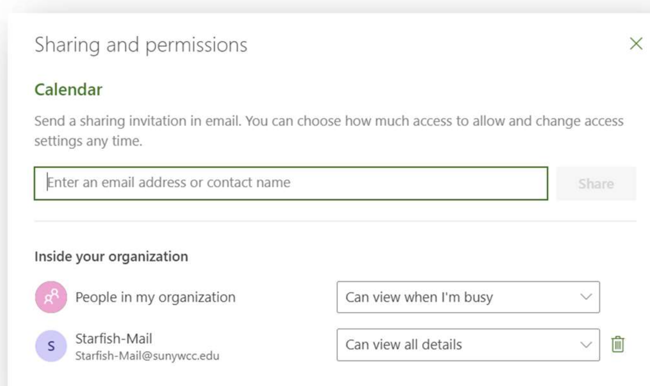
From Outlook 365 Desktop:

1. Click on the **calendar icon** on the left to switch to the calendar view.
2. Right-click the calendar you want to share in the left pane and click **Sharing Permissions** from the drop down.
3. In the **Calendar Properties** window, click **Add**.
4. In the **Add Users** window, enter Starfish-Mail@sunywcc.edu into the bottom field and click **OK**.
5. Set the **Permissions** to **Can view all details** and click **Apply**. Now click **OK**.



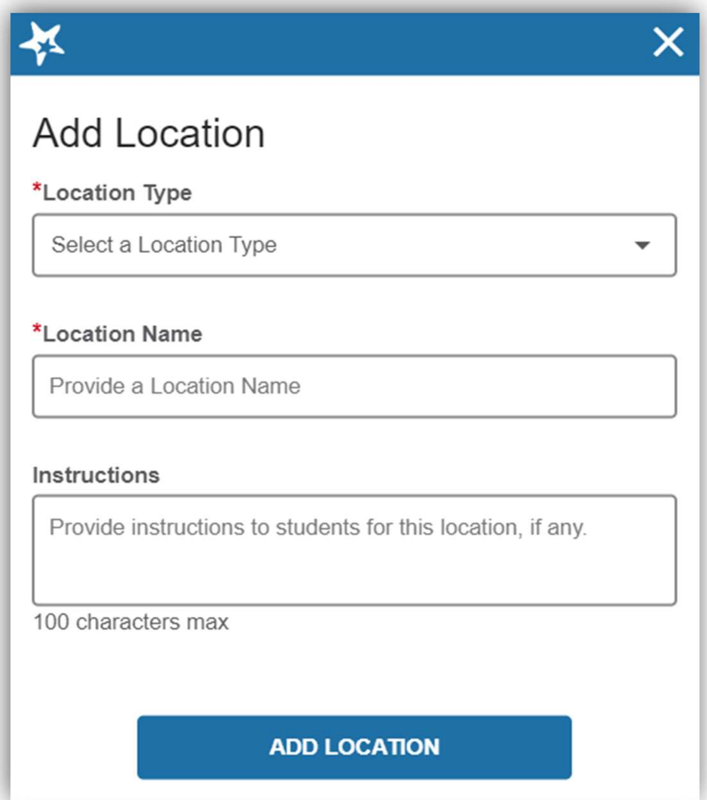
From Outlook 365 Web:

1. Click on the **calendar icon** on the left to switch to the calendar view.
2. Right-click the calendar you want to share in the left pane and click **Sharing and permissions** from the drop down.
3. In the **Sharing and permissions** window, enter Starfish-Mail@sunywcc.edu into the field. Click on the address when it appears in the drop down.
4. Choose **Can view all details** from the drop down and click **Share**.



My Locations

5. Select **Add Location** and a new window will open.
6. Select a **Location Type**.
7. Enter the **Location Name** and any relevant **Instructions** that you want your students to see when scheduling an appointment.
8. You will also be promoted to select a location when documenting a student interaction.



Calendar Management

9. Allow members of your team to manage your Viking Success calendar by selecting **Add Calendar Manager**.
10. Once the new window opens, select the **Add Calendar Manager,** and search the user by "last name, first name."

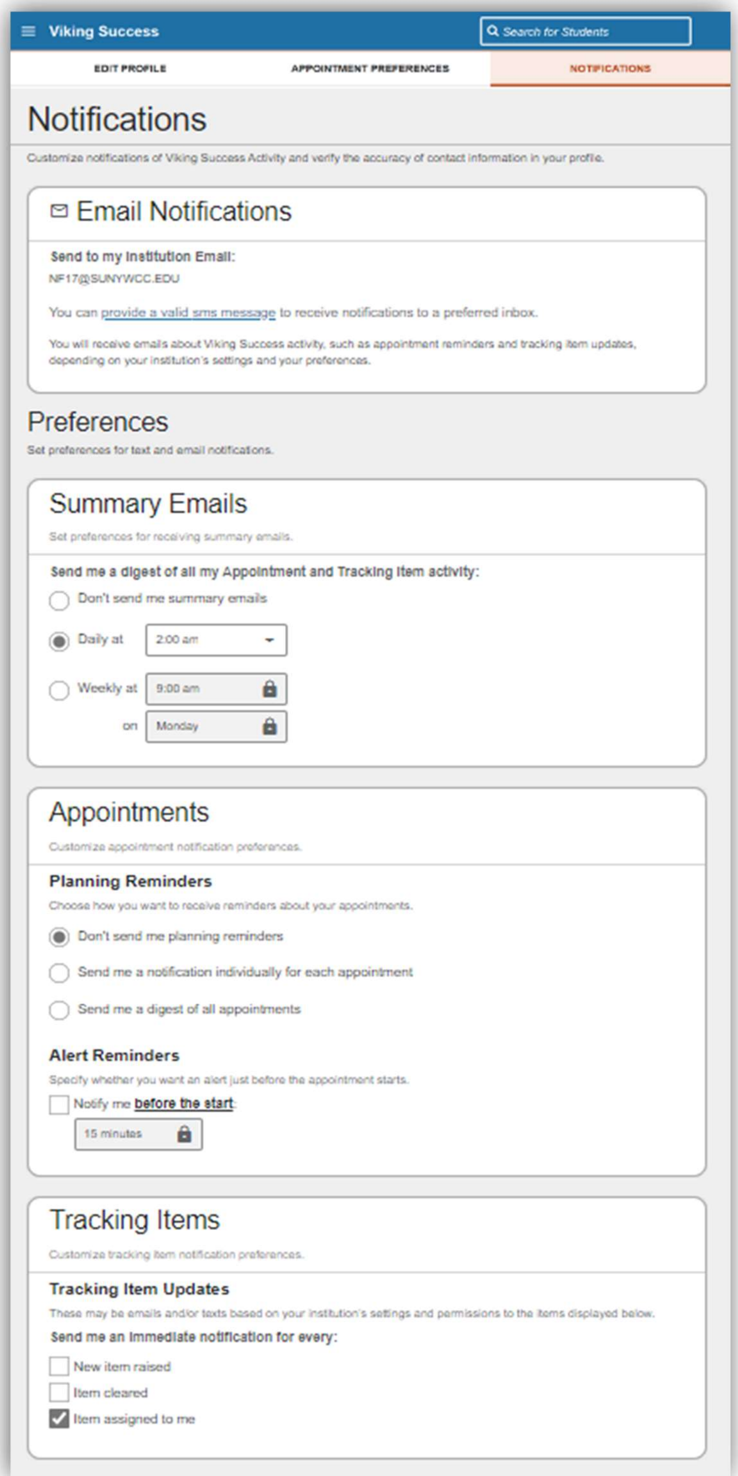
Please Note:

If you choose to share your calendar with a student worker, they will only see basic logistical information and will not see descriptions or outcomes.

Save Changes when finished!

Notifications

1. **Email Notifications**
    a. This field is pre-populated in Viking Success and cannot be edited.
    b. You will receive emails about Viking Success activity related to your students, such as appointment reminders and Tracking Item updates.



Preferences

2. **Summary Emails**
    a. Choose whether you wish to receive a digest of your appointments and tracking items at a custom frequency.
3. **Appointments**
    a. Choose you preferred reminder options for individual appointments.
4. **Tracking Items**
    a. Choose your preferred notification options for individual tracking items.

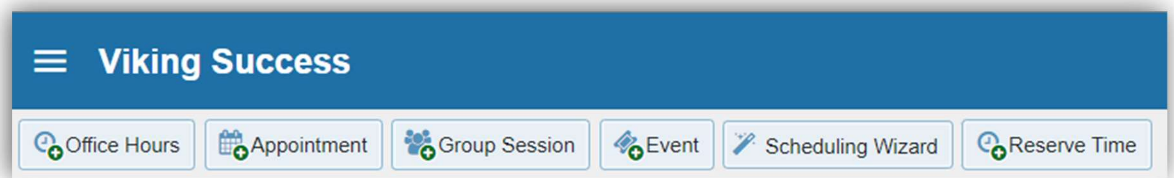
Save Changes when finished!

Office Hours

By adding **Office Hours**, you enable your students to schedule an appointment or view your walk-in hours on the platform. This can be seen when a student visits your profile or by using your **Share Links**.

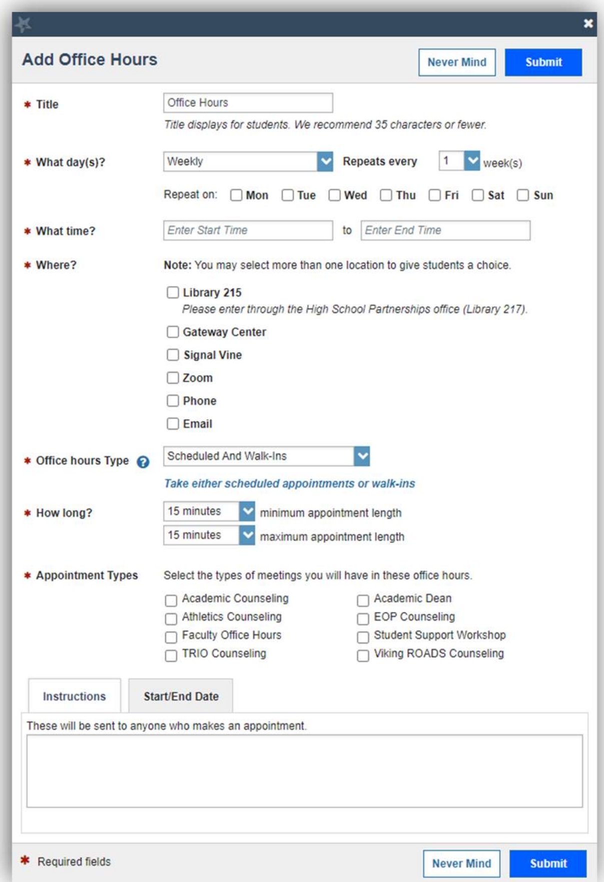
Add Office Hours

1. At the top of your **Home** and **Appointments** page, click the add **Office Hours** button**.**



2. Complete the fields presented:

- **Title:** This field displays to students and can be used to denote specifically targeted office hours (i.e., advisement, exam prep, portfolio review, etc.)



- **What days (s):** If you wish to set recurring office hours, select how often you want these to repeat. Otherwise, select *once***.**
- **What time:** Enter a start and end time.
- **Where:** Select where you will be holding office hours. Locations can be set through your **Appointment Preferences** (see page 8).
- **Office hours Type:** **Scheduled** hours allows students to book an appointment while **Walk-Ins** only provides students with the hours.

- **How long:** Set the length of meetings students can schedule during these office hours. This is only required when choosing the **Scheduled** type.
- **Appointment Types:** Selecting one or more type allows you to quickly document the outcomes of the student interaction. When allowing **Scheduled** hours, students will select from the chosen types to provide context prior to your meeting.

  Please Note:

  > Available **Appointment Types** vary from user to user. If you do not see an applicable type, request it by contacting the Viking Success team.

Legal and Ethical Responsibilities for Notes

It is important to fully understand both the **legal and ethical responsibilities** attached to **note-taking in a shared system**, especially as it relates to potentially sensitive information. Assume that students, parents, lawyers, or the public will read anything and everything you have entered.

Considerations to Take

Notes **SHOULD** be academic in nature and based on facts, objective, general, and non-descript.

Notes **SHOULD NOT** be judgmental, value-laden, guesses, predictions, or assumptions. They should not make mention to medical and mental health concerns, legal problems, social issues, family concerns, or conflicts with faculty or staff.

Before entering a note, think to yourself: *Is this information based on fact? Is this information that the student would want to be disclosed? Is this information that my colleagues need to know? Is this information within my field of expertise?* If the answer is *no* to any of these questions, do not include it in the note. **When in doubt, leave it out!**

Accessibility and Mental Health Referrals

Referrals to the Department of Mental Health & Counseling Services and Accessibility Services are confidential information protected by the Health Insurance Portability and Accountability Act (HIPPA) and Americans with Disabilities Act (ADA), respectively. These referrals should **NEVER** be included in Viking Success' shared notes system.

Examples of Dos and Don’ts

Situation	*Dos*	*Dont's*
A student is worried about their performance in two classes.	"Student is concerned about grades in two courses."	"Student is worried about two classes; doesn't seem motivated this semester."
An engineering student is considering changing their majors.	"Student is considering whether their current major is a good fit. Helped them consider other options."	"Student's personality isn't a good fit. I think they'd be better suited for something in the arts."
A student in an opportunity program is unable to afford credits and/or materials.	"Referred student to Financial Aid."	"First-generation student receiving little help from the family that is struggling financially."
A student has experienced an incident of domestic violence and is struggling.	"Student disclosed a personal situation and requested help from campus support services."	"Student reported an assault by their partner. I have referred them to Mental Health and Personal Counseling services."

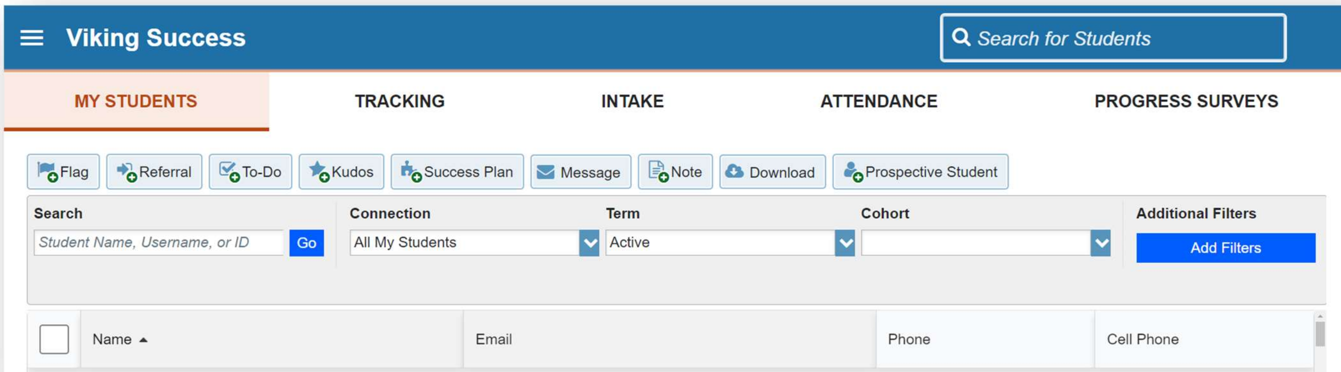
Privacy of Student Records

Information entered into Viking Success (as well as Degree Works) becomes an official part of a student's academic record and is subject to the Family Educational Rights and Privacy Act (FERPA). Even when marked as private, notes can still be accessed by anyone acting with legitimate educational interest or legal authority. Please keep this in mind when entering notes.

STUDENT INFORMATION

To view student information, choose the **Students** page from the navigation menu (indicated by the ≡ icon).

My Students & Tracking



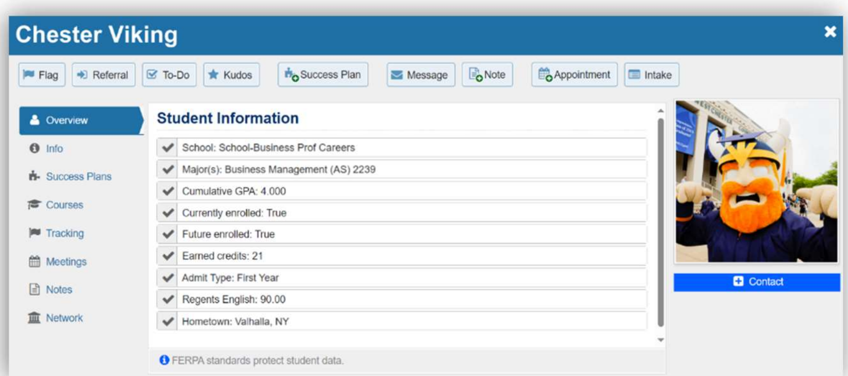
1. The **My Students** and **Tracking** tabs allow you to view a roster of the students you are connected to and their respective tracking items.
2. Faculty and staff will only be connected to students that they serve during the current semester.
3. **Filters** may be used to target a specific population of your student roster. This can include the **Connection** and **Cohort** drop down menus, as well as the options provided under **Additional Filters**.

Please Note:

Filters do not carry over between the **My Students** and **Tracking** tabs and are only applied to the tab for which they are set. If you are having trouble locating a student, please be sure to *check your filters!* You may need to use different attributes or clear your filters.

Student Folder

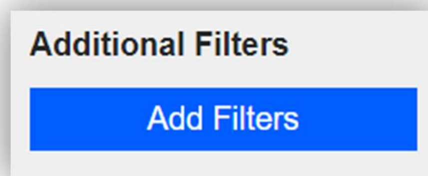
1. A **student folder** contains an overview of a student's academic history at SUNY Westchester. You can also raise tracking items and document interactions from this window.



2. Clicking on a student's name on the **My Students** or **Tracking** tabs will open the **student folder**.
3. Information that is visible in the **student folder** may be dependent on your level of access. If you require information that does not appear in the **student folder**, you may request it by contacting the Viking Success team.

Filters

Viking Success offers filters to target specific students on the **My Students** tab or specific tracking items on the **Tracking** tab. Shortcuts to certain filters can be found below these tabs with most filters being found by clicking the blue **Add Filters** button.



Commonly Used Filters

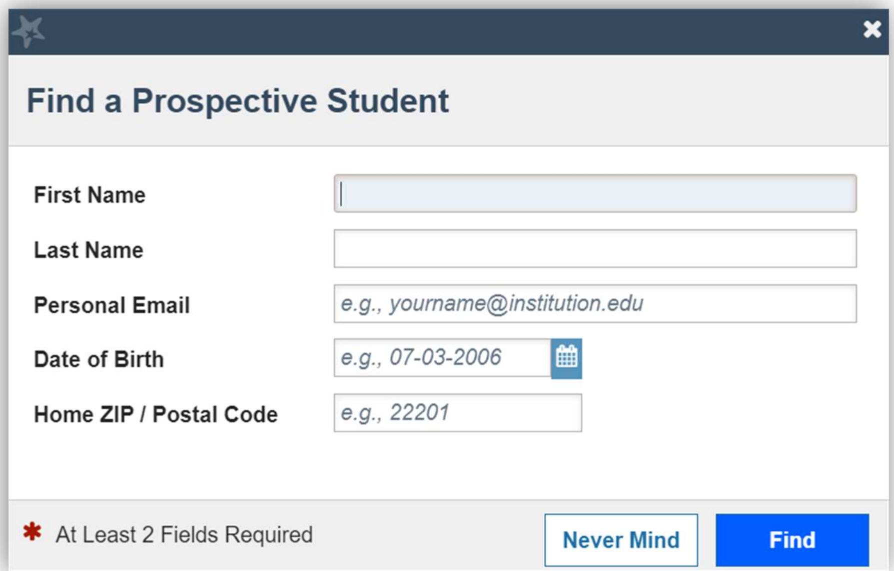
1. **Tracking Items**
   a. **Status**: Where the flag is in its workflow.
   b. **Tracking Type**: Filter by Flags or Kudos.
   c. **Created By**: Search by the faculty member who raised the item.
   d. **Course Context**: Find items associated with a specific course.
   e. **Creation Date**: Search by when the item was raised.
2. **Cohosts & Relationships**
   a. **Cohort**: These are manually filters created in collaboration with specific programs or offices to support their individual work.
   b. **Term**: Faculty can filter for students or tracking items from a specific semester.
   c. **Connection**: Allows faculty to filter by their courses. For support providers, this allows you to filter for students in the program(s) they serve.
   d. **Section(s)**: Allows any user to filter by specific courses. It is recommended that you search for the course by the section number.
   e. **Organization(s)**: Filter by school, degree program, or counselor caseload as defined by their PeopleSoft student group.
3. **Meetings**
   a. **Appointment Type/Reason**: Filter by the appointment reasons associated to specific programs or offices.
   b. **Dates**: Search for meetings documented between a certain tile period.
4. **Attributes**
   a. **Attribute**: Allows filtering by certain PeopleSoft data points such ad admit term, number of earned credits, and holds.

Please Note:

Set filters do not carry over between the My Students and Tracking tabs. If you are having trouble locating a student remember to **check your filter settings**!

Adding a Prospective Student

There may be times when you will meet with a new student whose account has not yet been created in Viking Success. In these instances, you will use the **Prospective Student** function.



1. From the **My Students** tab, select the add **Prospective Student** button.
2. A window will appear where you will enter the student's **first name**, **last name**, and either their **personal email address**, **date of birth**, and **home zip code**. Click **Find**.
3. If the student already has a prospective student profile, you will be able to click on their student folder to document the interaction. If the student **does not** have an existing prospective student profile, you will be prompted to click **Create New** where you will then be able to document the interaction.
4. Once the student's account has been created in Viking Success, the platform will automatically merge this with their prospective student profile.

Please Note:

The information you are using to find or add prospective students **should match their information in PeopleSoft**. If the information does not match then the account will not be able to merge with the prospective student profile.

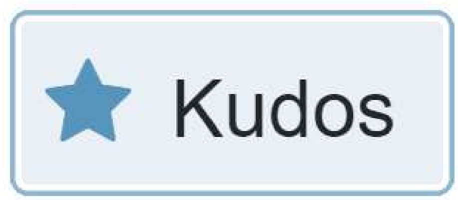
TRACKING ITEMS

Tracking items are core to WCC's **Early Alert System** and they're how actionable information can be sent to students and support providers. They can be raised *manually* or *automatically* as the result of a **progress survey**. Depending on your level of access in Viking Success, you may see some or all the below types.

Flags

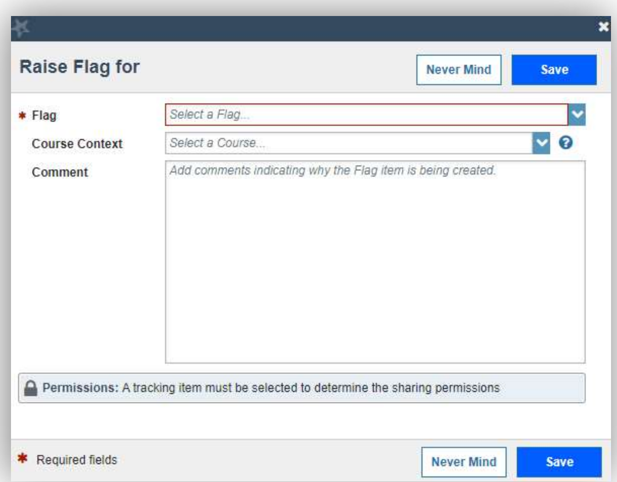
1. Flags are used to raise concerns about a student's academic performance.
2. When a Flag is raised, the student and their aligned Support Provider will receive a notification. When the flag is closed, you will receive a notification, depending on your settings.
3. **Flags are only for actionable concerns!** They alert a student's respective Support Providers that action needs to be taken on their end. Please refrain from using flags for simple communication with a student.

Kudos



1. Kudos are used to recognize a student's positive academic performance.
2. The student will receive a notification when they have a kudo.
3. **Kudos are just as important as flags!** By giving students positive encouragement, we can prevent them from viewing Viking Success as a disciplinary system that causes anxiety that they want to avoid!

How to Raise Tracking Items



1. Choose the **Students** page from the navigation menu (indicated by the ≡ icon).
2. Locate the student and open their **student folder**.
3. At the top of the student folder, select the appropriate tracking item and follow the prompt. Be sure to include a detailed comment as to reason the tracking item was raised.

Progress Surveys

A feature of the Early Alert System, progress surveys prompt faculty to easily check-in with students during key points throughout the semester. When a survey is launched, faculty will receive an announcement email with a link to the survey and its due date.

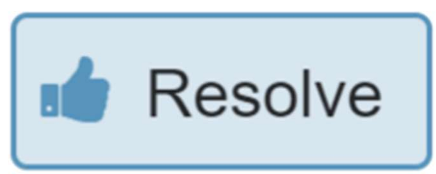
Completing a Survey

1. Open the received survey by following the link from the announcement email or by going to the **Progress Surveys** tab on your **Students** page.
2. Select a course from the dropdown to access that student roster.
3. Beside each student's name, you will have the option to select specific **Flags**, **Kudos**, or you may leave these options unchecked. If raising a flag, you are required to leave a comment detailing your concern.
4. Like all flags and kudos, Progress Survey flags have the same notification and closure options.
5. **If you are missing students** from your progress survey, it is possible that it was targeted to a cohort those students are not part of.
6. Progress Survey schedule can be found on the Viking Success resource page.

Closing the Loop

When a student receives a flag, they are encouraged to speak with their instructor or counselor to discuss the concern. After that meeting, the instructor or counselor should close the loop by clearing that raised flag and documenting the outcomes.

Closing a Flag



1. Locate the flag by going to the **Tracking** tab on the **Students** page or the **Tracking** tab on the **Student Folder**.
2. Select the **Flag** icon (⚑) and click the **Resolve** button.
3. A window will now appear where you will select one of the preset **Reasons** and **Add a Comment** with further context as to why the flag was closed.
4. After clicking **Submit**, a notification will be sent to the flag raiser and student with the selected reason and comments.
5. Once the flag is closed it cannot be reopened. The flag will still appear on the student's folder with the status set to **Resolved**.

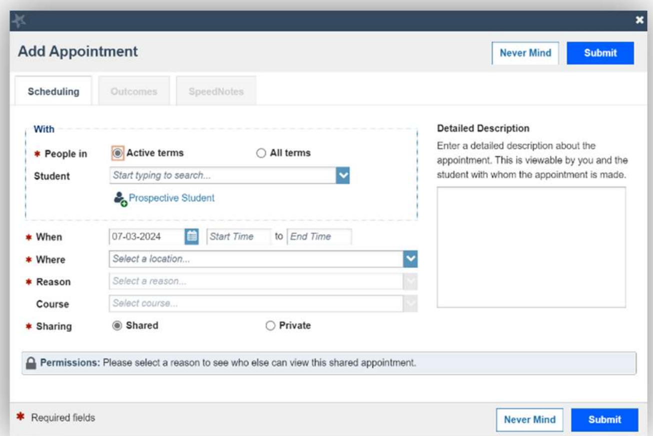
DOCUMENTING STUDENT INTERACTIONS

The Viking Success shared notes system provides a centralized location for documenting interactions between students and members of their success network. The **Appointment** function can document **one-on-one** meetings while the **Event** function supports the documentation of **events** & **workshops** with a single topic and the same outcome for all participants.

One-On-One Meetings

1. Select the add **Appointment** button from either the Appointments page or a student folder and complete the following information.

Scheduling Tab



1. **Student:** Can be searched by last name first name, ID number, or campus email alias.
2. **Where:** Locations can be set under the Appointment Preferences options in your user profile settings.
3. **Reason:** Preset options allow for more efficient data filtering.
4. **Sharing:** Private makes the appointment visible to only the support provider and the student. Even when marked as private, the information is still disclosable under FERPA.
5. **Detailed Description:** Record the reason for the meeting and what may have precipitated it.

Outcomes & SpeedNotes Tabs

1. **Time/Attendance:** The actual time meeting took place or whether student missed a scheduled appointment.
2. **Email:** This will send the note to the student's Messages page on their Viking Success profile. If you do not send a copy of the note, it will still be visible by the student.
3. **Comments:** Include a brief summary of all topics covered. Include any policies/procedures discussed, resources shared (include URLs if applicable), and any referrals made, while avoiding the disclosure of sensitive information. It

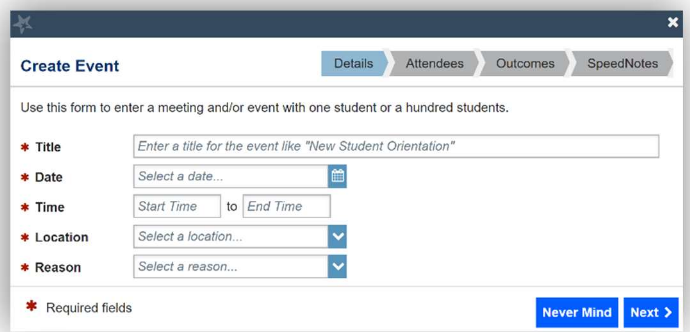
is also best practice to copy any written communications or emails (with sensitive information redacted).

Events & Workshops

1. Select the add **Event** button from the Appointments page and complete the following information.

Details Tab

1. **Title:** Use the most commonly used name for said workshop. If documenting multi-day workshop, please remember to use a consistent title across all Events.
2. **Date & Time:** When this group of students attended the event. Please be as accurate as possible.
3. **Location:** Locations can be set under the Appointment Preferences options in your user profile settings.



4. **Reason:** Please use the reasons listed under the Student Support Workshop category. If you do not have this category, or an appropriate reason is unlisted please contact the Viking Success team.

Attendees, Outcomes, SpeedNotes Tabs

5. **Student Identifier:** It is recommended that Student ID be used.
6. **Attendees:** Please separate each student ID number by a comma, or by placing each ID on its own line. You may copy and paste this information from an Excel column.
7. **Outcome Comments:** Include a brief summary of topics covered and the assistance given. This comment will appear for all students added to the Attendees tab.
8. **SpeedNotes:** If you do not see an appropriate SpeedNote, please contact the Viking Success team.

Please Note:

Events must be documented **after** the event has taken place. It is highly recommended that a virtual sign-in sheet (via Qminder, JotForm, etc.) be used to collect Student ID numbers during the event so these may be copy and pasted into the **Attendees** window.

ADDITIONAL FEATURES

Viking Success features a growing list of additional features that can be customized to better serve your specific student populations. Below is a list of features that are currently being used at SUNY Westchester. If you are interested in learning more about additional features that are not listed below, please contact the Viking Success team.

Service Catalog

1. Viking Success includes a centralized directory of the support services that are available to students at WCC. It can be found in the navigation menu (indicated by the ≡ icon) and select services may appear on your Viking Success homepage.
2. Service pages can contain basic information about a service including an overview, contact information, hours of operation, and a list of staff.
3. Service pages can also include a self-serve appointment feature, allowing students to schedule appointments directly with a service, program, or provider.

Reports

1. Depending on your access level, faculty and staff can run reports from Viking Success. These include data on tracking items, student interactions, notes, and surveys.
2. If you need to access to reports, please contact the Viking Success team.

SUPPORT INFORMATION

The Viking Success team is available for all support requests. We can also discuss tailoring features to align with your service or program's specific need. Trainings are also available and can be scheduled as one-on-one or department wide sessions.

Resource Page

WCC's website features a resource page for Viking Success users with best practices for using the platform on our campus and answers to frequently asked questions. To access the resource page please visit -- http://www.sunywcc.edu/academics/viking-success.

Help Center

Our technology partners at EAB have created a comprehensive help center to help navigate the nuts and bolts of the platform. You can access it by selecting the **Help** button on the navigation menu.

Please Note:

The EAB help center uses the name "Starfish". This is the trade name of the base software that Viking Success utilizes. You may hear your colleagues use both the "Starfish" and "Viking Success" interchangeably.

Contact the Team

For General Support and Configuration Requests:

Please email:

Nicole Fornario, *Viking Success Coordinator*
nicole.fornario2@sunywcc.edu

To Schedule a Training Session:

Please visit the resource page and click the **Training** tab to submit a request. You can also submit a request via the following link:

https://forms.office.com/r/T8nwFR3Rxk