

# Guided Pathways: Onboarding Students Using a Case Management Approach

Presented by:

Janet Visalli

Director, Holistic Student  
Support

Mohawk Valley Community  
College

# I. MVCC History

- 4 General Advisors
- 4 Success Coaches
- Transfer Services
- Adult Learner Services
- Worked in Silos



Students needed to explain their needs to multiple individuals.

## II. Guided Pathways

► Workgroups were created from a grassroots effort to redesign processes for our students that were in line with Guided Pathways. One of these workgroups was an Onboarding Workgroup which gave recommendations on how we could make the process easier for our students.

- Created Student Support Advisor position
- Union Environment
- Connections built between Student Affairs and Academic Affairs
- Streamlined processes between Admissions, Placement, Advisement & Financial Aid
- Take Away: Do not be afraid to make mistakes



### III. Case Management

## *Building a New Team*

**Question:** Is it possible to have a single point of contact for each student?

#### Holistic Student Support

- 12 Student Support Advisors
- Assigned to 6 Academic Schools (Art, Health Sciences, Humanities, Public & Human Services, STEM – Career & Transfer, Business & Hospitality)
- Caseload Assignments (ideal ratio < 225 students to 1 SSA)
- Professional Development (weekly trainings/meetings)
- Creation of a SSA Dashboard
- Communication Plan (Mongoose for texting)
- Basic Needs Survey (born out of COVID)
- GPS (Goals + Planning = Success) Appointments

# IV. Case Management – SSA Dashboard (a)

Main | Holds | MajorInfo | FinAidInfo | SOAZTRK | TSAZSAS | Academic History | Degree History | GOAZPIN | GPS Appt | Student Intake Int

Select or Enter Term: 202305 - 2023 Summer Semester  Show Future Terms

Search by Last Name (%): mcdermott Search

**Dawson P McDermott**

Step#1 202305 - 2023 Summer Semester  Show Future Terms

Step#2 Select Aid Year: 2324

Step#3 Enter Student ID#: M10020865 Search

M	Last Name	First Name	MI



**Has Holds:**

Has SSN: Y  
DoB: 12/20/1968  
Preferred Name:  
Dorm: N  
Veteran: N  
PTK:  
Status:  
EOP:  
International: N  
PTEC:

Athlete: N  
Sport:  
First Generation: N  
FERPA Release Year:  
Has Loaner Laptop: N  
Pathway Scholarship:  
COVID Compliant:  
Attestation Current Term:  
Attestation Next Term:

Addr T...	Addr1	Addr2	City	State	Zip	County

Phone	TELE_CODE	PRIMARY_IND	STATUS_IND

Email	Type	Pref
dmcdermott@mvcc.edu	MVCC	Y

Preferred Communication Method:

Student Email (Highlight and copy with Ctrl+C):  
dmcdermott@mvcc.edu

# IV. Case Management – SSA Dashboard(b)

[Main](#) | [Holds](#) | [MajorInfo](#) | [FinAidInfo](#) | [SOAZTRK](#) | [TSAZSAS](#) | [Academic History](#) | [Degree History](#) | [GOAZPIN](#) | [GPS Appt](#) | [Student Intake Interview](#) | [Orientation Grades](#)

**SSA:**  
 Major: 0000 - Nonmatriculated  
 School:  
 Advisor:

Major2: -  
 School2:  
 Advisor2:

**Degree Progress Requirements:**  
 Degree Progress Credits:  
 Most Recent Educational Goal:  
 Strength Quest Results:  
 Academic Standing: -  
 Overall GPA: 4  
 Program GPA: 4  
 Total Attempted: 1  
 Total Completed: 1  
 Total FA Attempted: 1  
 Transfer Hours:  
 High School GPA:

**Test Scores:**

Type	Score

**Prior College:**

CODE	COLLEGE	RECV	REV	OFFICIAL	ADMR_CODE
1466	Middle Tennessee S...	2/24/2000	2/24/2000	Y	
2345	Jefferson Comm Col...				
2543	SUNY College at Os...				

**Schedule:** 3 items

RSTS	CRN	Course	Section	Bill Hrs	Credits	Type	Course Title	Instructor	Campus	Room	Days

0 items

Total Totals  
 Bill Hrs: Cr Hrs:

# V. Case Management – Communication Plan (a)

Day	Date	Special Indicator	Delivery Method	Message Content	Notes	Template
<b>Pre-Semester</b>						
Monday	1/2/2023		Text	Payment Deadline Coming		Message Template: Hi <Name>, just a friendly reminder to be sure you've finished up your payment details. The deadline is August 22, in one week!
Tuesday	1/3/2023					
Wednesday	1/4/2023					
Thursday	1/5/2023					
Friday	1/6/2023					
<b>Pre-Semester</b>						
Monday	1/9/2023					
Tuesday	1/10/2023					
Wednesday	1/11/2023	First Payment Deadline	Text	Check-in regarding course materials	Approx. 1 week prior to start of classes	Message Template: Hey it's (SSA) your advisor from MVCC. We're about a week away from classes! Have all your books and supplies? The Bookstore & store site list everything you should need, but reach out if you need help!
Thursday	1/12/2023					
Friday	1/13/2023	Last day for 100% refund				
<b>Week 1 - Welcome!</b>						
Monday	1/16/2023					
Tuesday	1/17/2023					
Wednesday	1/18/2023	Instruction begins	Text	First day of classes--Online Accounts Check-In	Blackboard, Email, SIRS...	Message Template: Have you been able to login to your accounts? Are all your Blackboard courses accessible? Let me know if you need help!
Thursday	1/19/2023					
Friday	1/20/2023					
<b>Week 2 - Adjusting to College Life/Making Changes</b>						
Monday	1/23/2023	College Closed - Labor Day				
Tuesday	1/24/2023					
Wednesday	1/25/2023		Text	Check-in RE: Schedule, Attendance		Message Template: Hi <Name>, <SSA Name> again. Just checking in on your schedule: everything working out? Making it to all your classes?
Thursday	1/26/2023	HSS BLOCPARTY				
Friday	1/27/2023					
<b>Week 3 - Connecting with Campus Supports</b>						
Monday	1/30/2023					
Tuesday	1/31/2023					
Wednesday	2/1/2023		Email (&/or text?)	Student Supports	Learning Commons, Career Development, Counseling, C3, OAR, Ed. Tech., etc.	[Text] Message Template: Hey <Student Name>, MV has TONS of student supports--for school and personal stuff. If you think you could use help from Learning Commons, Career Services, Counseling or C3 reach out right away!
Thursday	2/2/2023					
Friday	2/3/2023	Census Date; Last day for 25% refund				
<b>Week 4 - Academic Skill Building</b>						
Monday	2/6/2023					
Tuesday	2/7/2023					
Wednesday	2/8/2023		Text	General Check-in	May address midterm of A-term courses, early alerts, campus	Message Template: Checking in on how you're doing, <Student name>. It's already week 4, and lots of notes, assignments and emails to keep up with. How you feeling? :) or :(?

# V. Case Management – Communication Plan (b)

Day	Date	Special Indicator	Delivery Method	Message Content	Notes	Template
Friday	2/10/2023					
<b>Week 5 -Deadlines &amp; Continued Academic Skill Building</b>						
Monday	2/13/2023					
Tuesday	2/14/2023					
Wednesday	2/15/2023		Email	Test Prep	Email templates on M drive	[Email] Message Template Hi, <Student Name>, I wanted to reach out and remind you of all of the great resources around campus. Some of them we've talked about and some may be new to you, but there is tons of support to be had if you need just about anything.
			Text	Last day to Withdraw, A-Term	CF100, PE, other half term concerns	
Thursday	2/16/2023					
Friday	2/17/2023					
<b>Week 6</b>						
Monday	2/20/2023					
Tuesday	2/21/2023					
Wednesday	2/22/2023	Last Day to Withdraw, A-Term				
Thursday	2/23/2023					
Friday	2/24/2023					
<b>Week 7 - - Preparing for Midterms</b>						
Monday	2/27/2023					
Tuesday	2/28/2023					
Wednesday	3/1/2023		Text	Midterms Approaching	Study techniques	Message Template: Can you believe it's almost midterm? Do you have a study plan in place? Don't forget the Learning Commons is open if you need help! Midterm grades can be reviewed in SIRS-make sure you check them and let me know if you need anything!
Thursday	3/2/2023					
Friday	3/3/2023					
<b>Week 8 -Midterm</b>						
Monday	3/6/2023					
Tuesday	3/7/2023	Midterm	Email	Midterm Grades	Due from faculty 3/10; email templates on M drive	
Wednesday	3/8/2023					
Thursday	3/9/2023					
Friday	3/10/2023	Midterm Grades Due (12:00pm)				
<b>SPRING BREAK</b>						
Monday	3/13/2023		Text	Researching Your Transfer		Message Template: Break is a perfect time to research transfer schools! You can prepare for the spring transfer fair or even schedule a campus visit! Contact me for more info or to set an appointment!
Tuesday	3/14/2023					
Wednesday	3/15/2023		Email	What Are Your Next Steps Towards Transferring?		Message Template: What are your next steps? If you plan to transfer consider meeting with your support advisor. You will have the opportunity to learn more about the transfer timeline and process, as well as some great questions to ask the college representatives at upcoming transfer events!
Thursday	3/16/2023					
Friday	3/17/2023					



## VI. Case Management – Basic Needs Survey

### Intake Survey Spring 2022

Submit Date: -

Do you have a reliable computer or laptop (with a webcam) to complete online schoolwork? -

I had an IEP or 504 plan in the past

Do you have internet service? -

I have utilized services such as extra time on tests, note-taking, or resource room

Do you know how to operate a computer or laptop to complete online schoolwork? -

I have utilized services such as captioning, interpreting, hearing aids, FM systems, or other assistive technology

Are you having difficulty affording food, have you been skipping meals, or cutting the size of your meals due to not having enough money for food expenses? -

I identify as a person with AD/HD or mental health diagnosis (bi-polar, depression, anxiety, etc)

Are you having difficulty paying for housing, utilities, books, school supplies or other expenses? -

I identify as a person with a visual impairments

Are you homeless, unsafe where you live, "couch surfing", or in need of assistance with housing? -

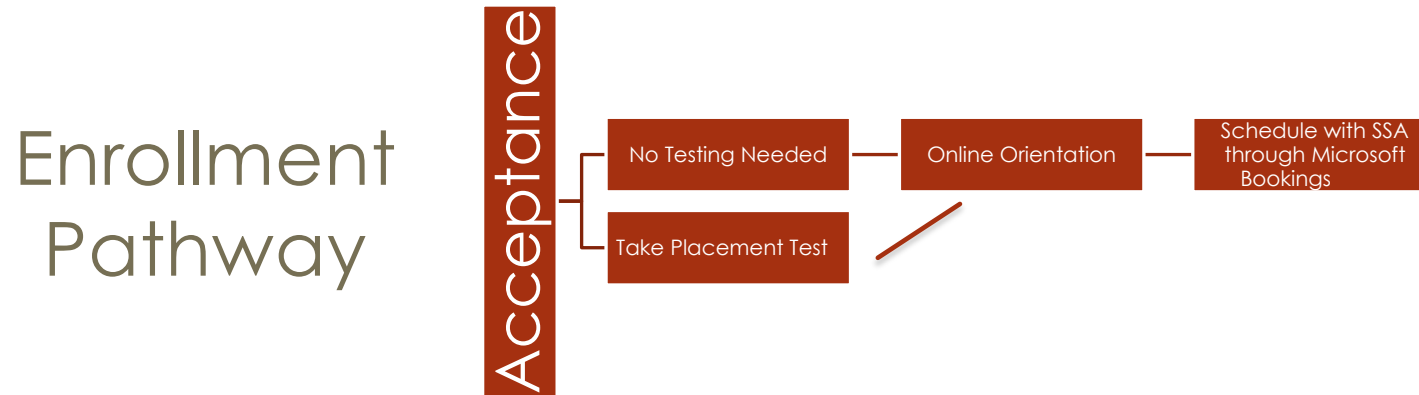
I have/have had an open case with ACCES-VR

Do you have reliable transportation to and from school (car, bus, walking)? -

I identify with having ongoing health diagnosis

## VII. GPS Appointments/Onboarding Process

- Students are assigned their SSA at the time of acceptance, depending upon their program of choice.



- A Student Services Specialist works with accepted students to move them through the enrollment processes whether that is to test first or move right to orientation. Once orientation is complete students can schedule their GPS appointment with their SSA in real time using Microsoft Bookings.
- General Studies students are sent first to meet with a Career Counselor to explore career options before scheduling with their SSA.

## VIII. Resources

*During students' GPS appointments, the following resources are discussed and the appropriate connections/referrals are made.*

- C3 (Community, College, Connection)
- Counseling Services (Mental Health Counselors)
- Career Services
- Veteran Education Services
- Tutoring Services
- OAR (Office of Accessibility Resources)
- EOP
- Residence Life
- Financial Aid
- Bookstore (Academic Advantage Pack)
- Scholarships

**Answer to the initial question:** Yes, you can have a single point of contact for each Student! It just takes the right staff, training and time.

# Questions

Contact Information

Janet Visalli

[jvisalli@mvcc.edu](mailto:jvisalli@mvcc.edu)

315-792-5535