



IUP Advise Quick Reference Guide 5 Alerts

Connect to the [IUP VPN](#) for full access to IUP Advise quick links.

Access IUP Advise: <https://IUPCRM.elluciancrmadvise.com>

Enable pop-up windows.

Managing Open Alerts

An **alert** is a notification that a student has something in their file that an advisor should review and may need address. Alerts can be automated because a student meets a prespecified condition or they can be created by faculty, staff, or students themselves, indicating an issue that requires attention. Created alerts will need to be closed after a faculty or staff member addresses the alert issue.

Many alerts are owned by a student’s primary advisor. These include items like a student withdrew from a class, is performing poorly on assessments, etc. Some alerts, like academic integrity or personal issues, are owned by specific IUP faculty/staff tasked with following up and completing the proper steps associated with the alert.

Alerts often require an **activity** be performed such as following up with the student or appropriate support services on campus. This can be done by completing and logging an activity, such as making a phone call or sending an email.

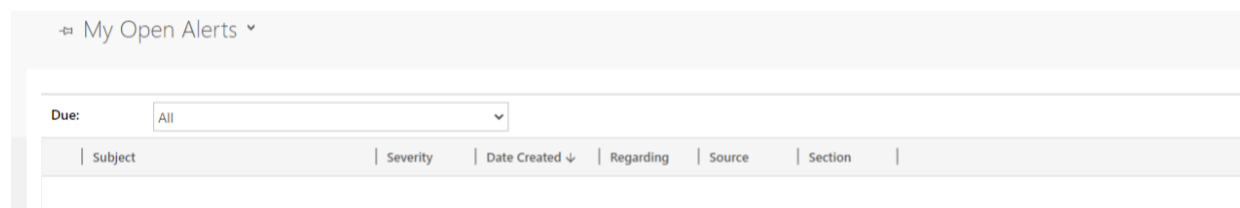
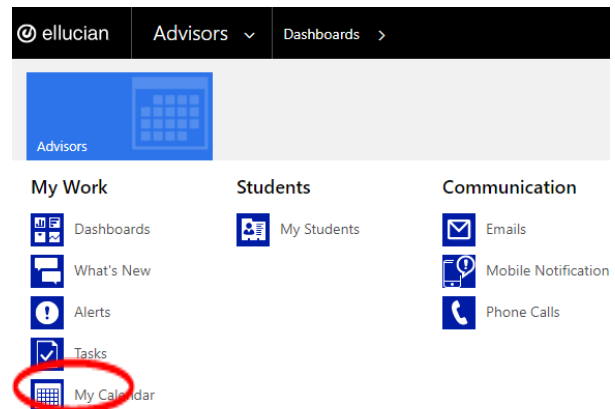
The alert/activities tools are designed and implemented to help IUP support student progress. When properly utilized, they should enable us to close the loop on student issues when they arise and increase overall student retention.

You can view open alerts assigned to you about various students in a two main locations.

1) Advisors tab (Menu Bar)

- Go to **Advisors** and select **Alerts**.
- You will now see **My Open Alerts**.

You will be able to see any tasks assigned to you, their severity (how soon they should be completed), the date they were created, and the student associated with the alert.



2) You can also view your open alerts on the **Advising Dashboard**. From the Alerts section on the Advising Dashboard, you can:

- Sort your open alerts by their severity (high, medium, low).
- View the activities you need to complete for each alert.
- Close the alert by selecting the alert, adding any associated activities by selecting **task**, and selecting **close**.

The screenshot shows the Faculty Dashboard interface. It features several sections: 'My Sections' with a table of course sections, 'My Students' with a table of student records, 'Course Scores' with a message 'No course scoring data exists for your students.', and 'Alerts' with a message 'There are no open alerts of the selected severity.' The 'Alerts' section is highlighted with a red circle.

Name	Number	Course	Term	Campus
HAWK 102	006	HAWK 102	Fall 2020	Indiana
HAWK 102	008	HAWK 102	Fall 2020	Indiana
HAWK 102	007	HAWK 102	Fall 2020	Indiana
HAWK 102	009	HAWK 102	Fall 2020	Indiana
HAWK 102	010	HAWK 102	Fall 2020	Indiana

Last Name	First Name	Preferred Name	Middle Name	Section	Number (Sect.)	Course Score	Course Score Color
Carter	Gillian	Gillian	Mae	HAWK 102	008	100	Green
Vanscoyoc	Meqan	Meqan		HAWK 102	009	100	Green
Jacobs	Sydney	Sydney		HAWK 102	011	100	Green
White	Charles	Charles	John	HAWK 102	006	100	Green
Patrus	Sydney	Sydney		HAWK 102	008	100	Green
Keyes	Dakira	Dakira		HAWK 102	006	100	Green

You can also view alerts on each student's profile. To view alerts on their profile, find a student you wish to look at and find the Alerts Section.

Marking an alert as complete

If you are the "owner" of an alert, you can close it by **marking it complete** after you have completed an activity that takes care of any necessary action associate with the alert.

To mark an activity for an alert complete:

- Find the alert section and open the activity you wish to close.
- Click **Mark Complete**.

Adding and removing tasks in alerts

You can add and remove tasks from an alert. To do so:

- Find the alert view of your choice (for instance go to Advisors then select Alerts).
- Open the alert you wish to alter.
- Under the tasks tab select **Add Task**, enter the task details and click **Save**.
- To remove a task, select the name of the task and click **Delete**.
- Once you are finished, click **Save**.

Adding and removing activities in alerts

You can add and remove activities from an alert. To do so:

- Find the alert view of your choice (for instance go to Advisors then select Alerts).
- Open the alert you wish to alter.
- Select the **Add New** button, enter the activity details, and select **Save**.
- To remove an activity, select the name of the activity, and then click the appropriate delete button.

Adding and removing private notes in alerts

You can add and remove private notes from an alert. To do so:

- Find the alert view of your choice (for instance go to Advisors then select Alerts).
- Open the alert you wish to add or remove private notes.
- Select **Add Private Note**, enter the title and text of the note, select **Lookup** and select the student you are adding the note to, and then click **Save**.