



Office of the Provost

Pathways Policies and Advising Documentation Best Practices

All Users

Pathways Team
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Pathways Student Data Use and Communication Guidelines

The document below outlines guidelines for the appropriate use of data and appropriate communications with students via Pathways. At its heart, Pathways is designed to help advisors help students most effectively navigate their Pitt journey. Pathways does this by easing administrative tasks, like scheduling appointments and messaging students, offering a central location for notes about students from advisors across the university, and providing a structure to help advisors share important information about students across offices.

The ease with which advisors can message students and see students' advising notes in Pathways is a strength. To support this operational efficiency, we have implemented a number of safeguards to protect student information. First, we have developed roles within Pathways in accordance with the minimum information a university employee would need to know about students in order to accomplish their job. For example, an individual who schedules advising appointments does not have access to student grades or advising notes as neither are relevant to scheduling appointments. Second, FERPA training was provided to all individuals working with Pathways so they are well versed in the do's and don'ts with regard to protecting student information. Third, we have provided the guidelines below about what is and what is not appropriate use of the various tools available in Pathways.

Data & Information

Information and data obtained via Pathways should only be used to help students based on the job responsibilities for which access to Pathways is necessary. This may include obtaining information from Pathways to inform advising sessions, identifying struggling students for extra attention, identifying students who may be eligible for scholarships and grants, or checking if a student followed through on your recommendation.

DO use information obtained from Pathways to ...

- Inform an advising appointment
- Identify students who could be eligible for scholarships or awards
- Check if a student followed through on your recommendations
- Identify struggling students

Information and data obtained via Pathways should NOT be used for any other purpose than your direct job responsibilities vis-à-vis your students. That is, you should use information and data obtained in Pathways only to support advising and mentoring of students. If you are an instructor, you may not use information obtained from Pathways to help decide what grade to give a student in class. If you are hiring a student for a job or research position, do not look at the students' advising notes or course grades in Pathways for additional contextual information. If you are deciding whether or not to admit a student to your academic or study abroad program, do not use contextual information from Pathways to inform your decision. If you conduct research on student populations, you may not use data obtained from Pathways to identify potential research participants or to provide additional data on existing research participants. Do not look up the academic record of your child's new boyfriend or girlfriend.

DO NOT use information obtained from Pathways to ...

- Decide what grade to give a student in a class
- Check the advising notes or course grades for student who has applied for a job or research position with you or others you know
- Inform decisions about admission to academic or co-curricular programs
- For research purposes
- Satisfy your curiosity about a particular student's academic record

Communication

Messaging of students from the Pathways platform should be done to provide academically-relevant information to students in support of the role for which you were given access in Pathways. (Please see the "Pathways Text Messaging Policy" which specifies when to text message vs. emailing students.) Use Pathways to schedule advising or tutoring appointments with students, to check-in on students about whom you are concerned or want to encourage to see a tutor, to alert students to resources or scholarships or awards for which they may be eligible, or to provide nudges for students who are close to deadlines for key milestones like graduation.

DO use Pathways to do things like...

- Schedule advising or tutoring appointments
- Check-in on students for whom you have academic concerns
- Encourage students to see a tutor
- Alert students about resources about which they requested more information
- Alert students of scholarships or awards for which they may be eligible
- Nudge students who are close to key milestones like graduation

Messaging of students from the Pathways platform should not be done to conduct business outside of the immediate responsibilities of your position or for your own self-interest. Do not use Pathways to invite students to participate in a research project, to advertise an event you or your unit are sponsoring, to encourage students to enroll in a course you are teaching, or to discourage students from enrolling in certain programs.

DO NOT use Pathways to do things like ...

- Invite students to participate in a research project conducted by yourself or others
- Advertise an event you or your unit are sponsoring
- Encourage students to enroll in a course you are teaching or your department is offering
- Discourage students from enrolling in certain programs

Students will be made aware of appropriate use of Pathways for contacting them and asked to report violations of these guidelines to PathwaysHelp@pitt.edu. Pathways staff are able to view messages sent via Pathways and thus, will be able to determine if messages comply with these guidelines. When a university employee is found to be in violation of these guidelines, they will be reminded of these guidelines and the relevant dean's office will be alerted and appropriate action will be discussed. If in

violating these guidelines a university employee also violates FERPA, university guidelines for violations of FERPA will be followed.

Who sees what in Pathways?

Academic Advisors and their supervisors (including relevant staff in the Dean's office)

Athletic Advisors

Academic Coaches

Professional Advisors in support offices (e.g., Pitt Global, Pre-Health Resource Center)

- Advising/Tutoring/Career/Financial Aid/Etc. appointment summaries
- Additional notes
- Your calendar of courses
- Detailed academic information (e.g., cumulative/term GPA, credits, # of D/F/W grades, course grades)
- Progress reports (e.g., reports of your midterm grades completed by instructors)
- Referrals assigned to them

Career Consultants

Residence Directors (not Residence Assistants)

- Advising/Tutoring/Career/Etc. appointment summaries
- Additional notes
- Your calendar of courses
- Basic academic information (e.g., cumulative/term GPA, credits, # of D/F/W grades)
- Referrals assigned to them

Financial Aid Counselors

- Advising/Financial Aid/Etc. appointment summaries
- Additional notes
- Your calendar of courses
- Basic academic information (e.g., cumulative/term GPA, credits, # of D/F/W grades)

Front Desk Staff

- Your calendar of courses
- Appointment scheduling information

Tutor Coordinators

- Tutoring appointment summaries
- Your calendar of courses

Peer Tutors

Peer Advisors

Resident Assistants

- Appointment summaries that the individuals created in the past 30 days

Course Instructors

The names of students enrolled in their classes

Best Practices for Writing Advising Reports & Notes

What should go into a report/note?



- Fact-based, descriptive notes convey the unique dynamics of each student advising contact
- Be specific when describing what was discussed and agreed upon between you and the student
- Use the outline below to help structure the note/report
 - Reason for meeting
 - Information provided to student (e.g., change of major, academic planning, pre-reqs, drop/add, satisfactory academic progress)
 - List of all majors, minors, certificates that are of interest to the student and you discussed
 - List of classes you suggested/discussed for enrollment
 - Note all referrals that were made and use the referral process functionality in Pathways to connect students to resources

Use objective language and be mindful of FERPA

- Exercise care when recording information, conversations, or referrals of a highly personal or sensitive nature
- Do not diagnose, assess, or offer personal judgement about students or their circumstance
- As with any document containing a student's personally identifiable information, advising notes/reports are part of a student's education record and are subject to FERPA
- For more information about FERPA, please visit the Registrar's website: <https://www.registrar.pitt.edu/faculty-staff/ferpa-training-resources>
- Note that all Pathways users are required to watch a video on FERPA made by Jen Marco



Advising Notes and Documentation Guidelines

Guidelines developed and approved by the Directors of Advising Group: January 31, 2020

Overview

Comprehensive documentation is required for all mandatory advising appointments and any other appointments/contacts (including email) where important and/or relevant information is discussed or delivered. Documentation must be input into the electronic system. The Pathways platform provides several different ways for faculty and staff to document a student interaction. Regardless of the way a faculty or staff member utilizes the platform, it is important to keep in mind that any record maintained in Pathways is part of the student's educational record, is viewable by others in the platform, and a student could request access to this information under The Family Educational Rights and Privacy Act (FERPA).

Expectations

To promote the most comprehensive and accurate reports/notes possible, complete them as soon as you can after meeting with the student. Many advisors include a gap between advising appointments to complete notes before the next student arrives. Others dedicate time throughout the day to ensure they are completed in a timely fashion. Regardless of your strategy, it is expected that all documentation is input into the system in a timely fashion.

Why Keep Reports/Notes?

Comprehensive documentation is a vital element of quality advising programs. Advising notes and reports can serve many purposes, depending on the situation. Maintaining records of interactions with students is essential for a variety of reasons:

1. It creates an "institutional memory" of contacts with students, which allows for enhanced collaboration and communication between advisors and other campus partners to provide consistent messaging to students.
2. It personalizes the advising experience by refreshing the advisor's recollection of previous conversations they had with the student or alerting them to previous conversations the student had with another advisor.
3. You can document your recommendations and/or referrals and the rationale for those recommendations/referrals.
4. It provides support to students going through transitions (either from advisor-to-advisor or other campus offices).
5. You can remind students of advice they received during an advising appointment, if shared with the student after the meeting occurs.

Remember, this information is invaluable to administrators and dean's office staff who often need to recreate a student's contacts with advising staff. Every substantial contact with a student or relating to a student should be documented, and should include appropriate details and the date of the interaction. Typically, this documentation includes:

- The content of the discussion with student
- Interpretations of policy

- Issues raised
- Recommendations made

Specific Ways to Document a Student Interaction in Pathways

Report/Appointment Summary: Summary reports allow you to document interactions with a student, whether the appointment was scheduled, a walk-in, or the student was a no show. Appointment Summary Reports should only include information related to that specific appointment.

Privacy: This report is hidden from student view, but other faculty and staff within the same care unit are able to see these reports. However, please keep in mind that any information you enter pertaining to a student becomes part of their official student record and may be subpoenaed by that student, as outlined in FERPA.

Notes: Notes offer an additional mechanism to jot down information about a student and collaborate across Care Units. Notes allow faculty and staff to document any important information about a student that should be visible to anyone working with the student. Notes are not restricted to specific Care Units, nor tied to student appointments. Therefore, they are accessible to any staff or faculty in the platform who have permission to view Notes, which currently includes all professional and faculty advisors.

Privacy: Notes can be seen by anyone in the platform. If you choose to make notes visible to only yourself, other users (such as platform administrators) may still be able to view these notes. If a student's name is checked when creating the note, then the student can also view the note.

Alerts/Cases/Referrals: When submitting a referral, comments can be added to assist the office to which the student is being referred. Once the referral office gets the Alert, a Case is opened, and once it is closed, any final comments can be added to the Case to inform the individual who made the initial referral the outcome of the Case. Please note that depending on the referral office and the nature of the case final comments may be minimal.

Privacy: Comments for Alerts and Cases are only viewable by professional and faculty advisors and are not viewable by students.

Tips for Documentation

1. Ensure that statements you make are objective and based on facts. Avoid statements that are judgmental, value-laden, or based on your own guesses, predictions, diagnoses, assumptions, etc.

Instead of: "Student is avoiding math because of fear of not passing."

Consider: "Student has not taken math since high school and expresses concern about succeeding. Referred student to the Math Assistance Center and Study Lab for additional support."

2. Try to be as clear, concise, complete, and professional as possible.
3. When possible, minimize the use of acronyms, abbreviations, and jargon. Try to use only those that are "universally" understood within the advising or University community.

4. Be sensitive to presumptions of gender. Refer to the student by the preferred name, pronoun used by the student, or by the word “student”
5. Include enough specific information to be useful for future advising appointments (yours or other advisors) with the student.

Instead of: “Student might want a W this semester.”

Consider: “Advised student against a withdrawal from BIOSC 0150 at this point in the term and encouraged the student to talk with the professor before deciding. Advised student of the March 8th Monitored Withdrawal deadline and explained the process for submitting the Monitored Withdrawal Form to the Student Records Office, should the student decide to pursue this option.

6. Document specific information you give to the student about policies, requirements, or deadlines.

Instead of: “Two more CS courses to go and then okay to apply for admission to SCI.”

Consider: “Assuming successful completion of current CS courses (CS 0401 and CS 0441), student will have to complete CS 0445 and CS 0447 to be considered for admission. Advised student of the March 1st deadline to apply to SCI and informed student that they could apply while enrolled in the CS 0445 and CS 0447 courses next semester.”

7. Include information relevant to a student’s academic progress, questions, or situation and document all academic suggestions and/or referrals and the rationale for such.
8. Document possible consequences related to student action or inaction, as well as pros and cons of options if applicable
9. Include information that reflects a holistic approach to advising (i.e.: discussions around personal, social, or career interests/goals).
10. Document referrals to other offices on/off campus.

IMPORTANT NOTE: If the referral made is of a “sensitive” nature, you may record, “Referred to appropriate resources” if you choose. However, it is also okay to be more specific about the referral office (ex: Disability Resources or Counseling Center). What you should avoid including is very specific and/or in-depth details about mental/medical conditions/diagnoses or personal issues/situations that the student reports to you. Use caution when documenting anything related to political or religious affiliation, disclosed or perceived sexual orientation, or any other information that could potentially disadvantage a student if released to others.

TIP: “When in doubt, leave it out.”

Sensitive Subject Matter

Caution should be exercised when using Pathways to document topics that contain sensitive or time-sensitive subject matter. Do not use Pathways to document emergency situations. If a student issue is an emergency or requires an immediate response, please call the Pitt Police: 412-624-2121. The [CARS Team](#) will continue to respond to student behavior identified as reasonably causing concern for students' health, welfare, and safety.

If you believe it is important document sensitive subject matter, use general or coded language. Below are a few examples of ways to communicate this information:

- Student reported extenuating circumstances related to his academic progress this term
- Student discussed a difficult situation and requested help from a campus support service
- Student disclosed a personal situation that is having an impact on how things are going this semester

Considerations for Documentation in a Shared System

1. When deciding whether or not to access a student's record, ask yourself: Do I have a specific, job-related need to access this record? Or am I just satisfying my curiosity?
2. As was discussed at the end of the required FERPA training video (before receiving access to the Pathways Production Site), when writing a note, avoid making funny and/or sarcastic comments. Ask yourself:
 - Is this something another Pathways user connected with the student would need to know?
 - Are the details in my notes based on fact? Or are they observational and personal? Is the distinction clear and written in a non-judgmental tone?
 - Are my notes interpretable by someone else? Did I provide enough information for another person to understand the substance and context? Did I avoid using jargon and acronyms?
 - Would I be okay with this information being on the front page of *The Chronicle of Higher Education*?
3. Electronic reports and advising notes are considered "education records" and, as such, students have the right to inspect them under FERPA. Student education records are also subject to disclosure in certain legal contexts. Assume that students, parents, other University faculty/staff, and/or the general public will read anything and everything you write.
4. It is not uncommon for students to disclose issues of a "sensitive" or confidential nature to you. In those instances, it is best to use non-descript language and your own best judgement when documenting in the shared system. In some instances, it may not be appropriate to include detailed documentation about specific disclosures or discussions in the electronic system. In those instances, if you deem the information important enough to keep note of but too sensitive to include in the shared system, it is permissible to create your own private notes (i.e. notes that are securely stored and not accessible to others). Those notes should be used only to reinforce your memory of specific student cases, kept in your sole possession, and only as long as they are useful.

Advising Documentation in Pathways: Sensitive Situations

Caution should be exercised when using Pathways to document topics that contain sensitive or time-sensitive subject matter, including (but not limited to) sexual assault, crime, medical diagnoses, and mental health issues. Do not use Pathways to document emergency situations. If a student issue is an emergency or requires an immediate response, please call the Pitt Police: 412-624-2121. The [CARS Team](#) will continue to respond to student behavior identified as reasonably causing concern for students' health, welfare, and safety.

Advisors and mentors are among the most salient relationships students will form in college and on the front lines of student success. Because of the critical role a mentoring and advising relationship can play in a student's college experience, we know that providing information about how to help students through difficult situations is important to fostering that relationship. Oftentimes, students trust advisors and mentors with these difficult conversations. It is important to *remember to listen first then assess later*. This guidance will help in the assessment of the student situation, including how to document information in the Pathways platform and how to refer the student to an appropriate office at the University of Pittsburgh. Information about how to make a referral in the Pathways system can be found here:

<https://www.pathways.pitt.edu/resources/referrals>

General Don'ts and Do's When Documenting Sensitive Situations:

Don'ts	Do's
Summarize <i>everything</i> that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals made, and follow-up plans.	Briefly summarize what was discussed as it related to student success for future reference by the student, other support staff, and future advisors
Report problems with specific instructors	Summarize specific course recommendations
Use acronyms students and other campus support staff may not understand	Spell things out for a general audience
Include speculation, subjective opinions, or judgments	Write fact-based academic-related notes
Include sensitive information, personal concerns, private matters	Use general or coded language concerning sensitive material
Report details surrounding sensitive referrals	Record referrals made
Include notes about negative student behaviors	Include notes about positive student behaviors
Attach emails with sensitive/private content that the student likely didn't intend for other campus providers to read	Attach important emails

Scenarios: How Much Might Be Too Much?

The following examples are meant to help advisors consider ways in which they could document certain types of sensitive situations in the Pathways system. They are NOT meant to provide advisors with

recommendations on how to best handle those situations. If you are uncertain about how to handle similar situations, discuss them with your supervisor for guidance on appropriate action.

If a referral made is of a “sensitive” nature, you may record, “Referred to appropriate resources” if you choose. However, it is also okay to be more specific about the referral office (ex: Disability Resources or Counseling Center). What you should avoid including is very specific and/or in-depth details about mental/medical conditions/diagnoses or personal issues/situations that the student reports to you. Use caution when documenting anything related to political or religious affiliation, disclosed or perceived sexual orientation, or any other information that could potentially disadvantage a student if released to others. Tip: “When in doubt, leave it out.”

Scenario 1: Student discloses sexual assault

During an advising appointment, a student discloses to you that she was the victim of sexual assault.

Too much...	About right...
“Jane disclosed that she was raped at an off-campus party this weekend. I confirmed that the alleged perpetrator has been arrested and does not pose a continuing threat to Jane’s safety. We discussed the communication of excused absences to her professors for the duration of her hospitalization. To fulfill my Title IX reporting obligation, I contacted Student Affairs immediately after our advising meeting. I also set up a meeting for Jane with a member of the CARS Team for ongoing support.”	“After Jane disclosed a recent incident of a serious personal nature, I connected Jane to the Associate Dean’s Office to talk about outreach to her instructors. I also contacted Student Affairs and made sure that Jane was aware of campus and community resources that are available for continued support and connected her to them.”
Possible Referrals: Title IX Office , CARS	

Scenario 2: Student discloses that they feel suicidal.

A student verbally says to you during an advising appointment, “I’m thinking about committing suicide before the semester is over.”

Too much...	About right...
“Met with student to talk about next semester’s classes. Recommended he gets started on his foreign language requirements. At the end of our meeting, when I asked him how things were going, John said “I’m thinking about committing suicide before the semester is over”. I immediately walked John to the University Counseling Center (UCC).”	“Met with student to talk about next semester’s classes. Recommended he get started on his foreign language requirements. At the end of our meeting, when I asked him how things are going, John disclosed a serious personal situation so I immediately walked John to the University Counseling Center (UCC).”
Possible Referrals (suggested order): University Counseling Center , Pitt Police , CARS , Residence Director Pathways referral	

Scenario 3: Student discloses learning disability

A student informs you that she is not doing well in coursework despite the fact that she is using every tutoring/learning assistance resource available. After you learn that she is indeed trying and that she seems to lose concentration very quickly, you decide to refer her to Disability Resource Services.

Too much...	About right...
"Jane came in to discuss her lack of success in her coursework this term. After an extensive conversation of how she is approaching her schoolwork, I decided to refer her to Disability Resource Services for consultation because it's clear to me that she has attention deficit disorder."	"Jane came in to discuss her lack of success in her coursework this term. After an extensive conversation of how she is approaching her schoolwork, I referred her to Disability Resource Services for consultation."
Possible Referrals: Disability Resource Services	

Scenario 4: Mental Health

A student disclosed an illness (mental or physical) that is affecting schoolwork.

Too much...	About right...
"Met with Joe to reduce his course load because he indicated that he is suffering from bipolar disorder and cannot handle five courses this semester. Joe stated that he is working with a psychologist and is currently taking medication. Joe will consult with me for future term scheduling."	"Met with Joe to suggest ways that he could reduce his course load due to a health-related situation. Joe will consult with me for future term scheduling. I also connected Joe to campus resources for additional support."
Possible Referrals: University Counseling Center , Residence Director Pathways referral	

Scenario 5: Death in Family/Family Emergency

A student discloses that their grandfather has passed away and that they will need to be absent to attend the funeral.

Too much...	About right...
"Bryce's grandfather died this weekend after a long battle with Alzheimer's Disease. Bryce will miss class this coming week to attend the funeral in California. I extended my condolences and appropriate staff in the Associate Dean's Office so that they might send out official notification to his professors. I asked if he wanted me to refer him to the UCC for grief counseling after his return. He will let me know."	"Bryce had an unfortunate familial matter come up and has to travel to California. He will miss the next week of classes. I connected him to the Associate Dean's Office for possible notification to his instructors. I made sure to discuss support services on campus should he wish to make use of them upon his return."
Possible Referrals: University Counseling Center , Director of Advising Unit and/or Dean's Office, Student's Instructors	

Scenario 6: Challenging Student Advising Appointment

You met with a student after they requested to discuss adjusting their course schedule. He was very rude and inflexible; the scheduling process was very difficult.

Too much...	About right...
"Met with Mark related to his request to adjust his schedule. Mark demanded to have all of his courses after 12:30pm and would not take a math course despite my suggestions. Mark was extremely rude and told me that I was no help.	"Met with Mark related to his request to adjust his schedule. He resisted many of my suggestions. I explained the potential impacts of his preferences on his academics. We worked out his schedule after much deliberation. He elected not to take a math course against my guidance."
Possible Referrals: Director of Advising Unit, Office of Student Conduct	

Scenario 7: Reported Behavioral Issues

A student has missed 2 weeks of classes and has been unresponsive to any emails from the professor and advisor. The advisor calls the Residence Director to see if they can check on the student. The Residence Director tells you that the student hasn't left her room in 2 weeks and isn't showering.

Too much...	About right...
"Professor Jones reported to me that Sara has missed 2 weeks of classes and has not responded to emails. I called her RD. The RD told me that the student hasn't left her room in 2 weeks and isn't showering. I asked the RD to bring the student into my office or to the UCC for assistance."	"Professor Jones reported to me that Sara has missed 2 weeks of classes and has not responded to emails. I called her RD. Based on our conversation, I asked the RD to bring the student into my office or to the UCC for assistance."
Possible Referrals: Residence Director Pathways referral , CARS , University Counseling Center , Student's Instructors	

Pathways Text Messaging Policy

Overview

The Pathways platform offers text messaging functionality that can be used on a case-by-case basis to communicate with students and/or across the board for appointment reminders. Because we recognize that texting students supports a holistic advising approach, we have developed this policy governing the use of text messaging to (a) create uniformity in how Pathways users communicate with students and (b) ensure that students are not inundated with text messages from the Pathways platform. It is important to note that students can opt out of receiving text messages, but those who do will continue to receive messages from Pathways to their Pitt email address.

Below we outline general recommendations to help optimize the use of text messaging in Pathways as well as specific recommendations governing appointment scheduling and messaging with students.

General Recommendations

- When advisors meet with students, explain the types of communications that Pathways users might send and ask how the student would like to receive these types of communications, noting that the method of communication might depend on the type of communication. Add a “Note” to that student in Pathways about their preferred method(s) of individual communication.
- Keep the message short. You only have 160 characters. But it is important to identify yourself, so students will know from whom the message is coming. For example, at the beginning of the message write, “This is your advisor, Amanda Brodish, from the Provost’s Office.”
- When possible, use the student’s name in the text message.
- If you will be texting several students at once, allocate time to immediately respond to students directly within the Pathways platform. When you respond to students directly in the Pathways platform, you can choose to reply with a text message, which can be helpful for quick communication with students.
- The content of a text message is part of the student’s educational record and would be subject to a FERPA request. Accordingly, be sure to follow the Pathways [documentation guidelines](#) in writing text messages.

Recommendations for Appointment Scheduling & Reminders

- For advisor-scheduled appointments (via appointment campaigns or individually scheduled appointments), appointment reminders (sent one hour before the appointment) should be sent via text message and/or email, based on advisor choice.
- For student-scheduled appointments, the default is for students to receive appointment reminders (sent one hour before the appointment) via text. However, students can opt-out of receiving reminders via text message (by replying “STOP” to the text message) and/or opt-in to receiving these reminders via email.
- For early morning appointments or when a student is a few minutes late to an advising appointment, consider sending the student a text message reminding them of the appointment.

Recommendations for Sending Messages to Students

- For topics that are not time-sensitive, Pathways users should first use email functionality in Pathways to reach out to students. If students are unresponsive to email, Pathways users can consider using text message functionality. But consider referring students to their email for more information about the topic at hand.
- For time-sensitive issues, Pathways users may use the text messaging functionality to communicate with students. Examples of time-sensitive issues include failure to enroll in classes for the next term, a missing item left in a classroom or office, or a missing piece of information for an upcoming appointment.

Pathways Naming Convention Best Practice

What is a naming convention?

A naming convention is a generally agreed upon set of rules for naming something. More specifically, it is a collection of rules followed by a set of names which allow users to deduce useful information based on the names' character sequence and knowledge of the rules applied.

Why is a naming convention important in Pathways?

Because some tools in Pathways display all Watch Lists, Appointment Campaigns, and Saved Searches used in the platform, having a common and consistent naming convention allows useful information to be deduced from the names. Having a consistent naming convention also allows older or out of date lists or campaigns to be quickly identified and deleted. The more organized we can be with managing our lists, the more efficient and effective we can be in advising work.

Best Practice for Appointment Campaigns

- Use an agreed upon abbreviation for your center or department followed by your last name followed by the current term followed by one of the campaign types below
- Do not use special characters such as &, !, *, etc.

Do	Don't
DSAS Gonzales Spring 2020 Registration	Registration Appointments
Bio Berliner Spring 2020 Newly Declared Majors	New Students

- Registration (First Year, Sophomore, Juniors)
- Newly Declared Majors
- Transfer Students
- Graduation Review
- Students of Concern
- Workshop
- New Students

Best Practice for Watch Lists and Saved Searches

- Use the current term followed by a description of the watch list/saved search
- Use clear and concise descriptions that you'll remember in the future
- Do not use special characters such as &, !, *, etc.

Do	Don't
Fall 2018 First Years	Fa '18 Freshmen
Spring 2020 Undeclared Major	Undeclared
Fall 2019 SCI First Years	2191 SCI Fshmn