



*We believe that
EVERY INTERACTION IS A RETENTION EVENT;
SOS can improve our interactions
AND we can all better serve our students.*

WHAT IS SOS?

SOS is Rochester College's personalized version of the Pharos360 software. It is case management software that is specifically created to make all your interactions more efficient and in the process, better assist our students.

TO ACCESS SOS

In any web browser, type: <https://rc.pharos360.com>

Login: Use your RC login

Password: Use password you use for RC login.

NOTE: *All FERPA restrictions apply to SOS information.* Also, be sure to LOG OUT when you are done using SOS.

AFTER LOGIN

Your view opens to the *Manage Active Cases* screen, your "Home Screen."

Along the very top, you will see a crimson menu bar that offers: **Launchpad, Send Alert, "Your Name," Settings, Management, and Logout.**

SEND AN ALERT

Click on the *Send Alert* at the top on the crimson menu bar.

- ❖ A search screen will appear.
- ❖ Type the first or last name of the student and hit enter or click on the *Search* button.
- ❖ If you see the student's name you are searching for click on the "Send Alert" which will be at the right of their name under the heading "Actions".
- ❖ A form will come up and you will put your phone number, dept. and relationship to the student.
- ❖ If you would like to be included in progress about the student click the box.
- ❖ Complete the form clicking as many appropriate boxes as needed. There is a comment section at the end where you can tell us what you have done to address the situation with the student. You could copy an email that you sent the student or summarize a conversation.
- ❖ Click Send. You will receive a thank you email and will be included in any progress reports.

MANAGING ACTIVE CASES

Your view opens to the *Manage Active Cases* screen, your “Home Screen.”

Along the very top, you will see a crimson menu bar that offers: **Launchpad, Send Alert, “Your Name,” Settings, Management, and Logout.**

Below the crimson menu, you will see *Manage Active Cases* screen.

The three tabs read:

- ❖ **Manage Active Cases:** to look at open cases
- ❖ **New Case:** To search for ANY student; to create a new case
- ❖ **Search:** to search through all currently OPEN cases.

Under the three tabs, you will see a gray menu bar and a full listing of your current cases.

- You can choose what cases you see by selecting from the pull down menu, located under the magnifying glass and “Search” on the right. You can look at “All Cases” or “Your Cases”
- You can sort/filter the cases by clicking on the heading in the crimson menu bar.

To search for a student, click on “New Case”> enter the student name> click Search> click on student’s name.

THE STUDENT PAGE

Here you will have all the student information you need to assist them in a timely fashion! Core users have access to most informational aspects of a student’s life here on campus: Contact Info, Demographics, Academic Info, etc.

- At the top of the screen, you see any case information you have created on a student. (No case: no listing! But you can still enter notes on the student.)

Down the left side of the screen, you will see the student’s name, ID picture and a heading: **Contact Student**. This enables you to change the students contact info, or directly email them. (The email comes from your outlook account.)

The next heading: **Collaboration**, allows you to interact with the people who have a direct campus relationship with the student.

- ❖ **Edit Circle of Care:** add people to a team to collaborate about the student
- ❖ **Request Feedback:** Send a query, from a template, to one or a group of people.
- ❖ **Report Progress:** GIVE feedback to other people on the team about a student.
- ❖ **Email Team:** Email selected recipients, using a preset template, to update or ask for input.

The **Case Management** heading features choices that allow you to document your interactions with or about a student:

- **Record Contact:** document a contact or attempts at contact.
- **Record Note:** document info that you want available on the student for your future reference.

Down the center of the screen, you see **Student Information** arranged in tabs. Below that, the student’s **Class Information**, current schedule with links to directly email a single professor. (Use **Email Team** to send an email to more than one of them.)

Finally, you see **Log Entries**, where all of the interactions with a student are recorded. Note: **The log at the bottom of each student's page permanently retains all interactions: your contacts with the student and your notes.**

CREATING AN ADVISING LIST OR GROUP

What is great about keeping your advisees or group in a management system is that if a case gets opened on one of your advisees or students (an alert is sent) you will know.

- ❖ On your home page at the top on the crimson menu bar click on the *Launchpad* link
- ❖ A dashboard will appear with 4 icons (Send Alert, My Students, Feedback Requests, Surveys)
- ❖ Click on the *My Students* icon
- ❖ There will be three columns (Groups, All Students, Info) and in the first column will have a heading *All Students* and then *Your Courses, Labels* (group headings you create) and your *Care Areas*.
- ❖ To create a group like Advisees or Small Group click on the "*All Student*" heading in the first column. Then search for the student in the second column. You can search by first or last name, click search.
- ❖ Click to check the student you wish to include in your group. Their information will pop up in the last column.
- ❖ There will be four buttons under their picture. Click on the Label button and click the word "New".
- ❖ In the pop-up box type the name you wish to give your group and click "Create Label".
- ❖ To add more students continue in the second column searching for the students you wish to add. Because you have created the new label when you go to add the next student and click on the label button under their picture the label you created will appear and you will click on that. You must confirm you are adding them.

FAQ'S

How do I search for Students?

Go to Manage Active Cases> click on "New Case"> enter the student name or ID number.

- ❖ or go to **Launchpad** and choose "Send An Alert"
- ❖ Enter student name or ID number: Susie Smith
- ❖ Click on Name of student in results.

How do I record time spent with students?

- ❖ Go to: Send An Alert/Referral> input Student Name> Click on student name to go to student page.
- ❖ Under the student's picture on the left, see "Case Management." Select "Record Contact."
- ❖ Complete the fields, noting time spent.

How do I make a note about a student?

- ❖ To record case notes, reminders to yourself, and any info about student you want to keep in his/her file. It is YOUR personal file folder about the student.
- ❖ Go to: Send An Alert/Referral> input Student Name> Click on student name.
- ❖ Under the student's picture on the left, see "Case Management." Select "Record Notes."
- ❖ Complete the fields, noting time spent.
- ❖ Remember, only people in your individual Care Area can see these notes. They will NOT appear to anyone else even if they look at the Student Page.

How do I send an email to a student?

- ❖ Search for the student, then either click “Send an Email” to the right of the student name, or go to the student home page, look under the student photo, and find “Contact Student.” This email comes from YOUR email account but is recorded in log at the bottom of student’s page.

How do I delete an error I made in a case note?

- ❖ You cannot delete or edit a case entry once you have made it. This protects the integrity of the data.
- ❖ If you have made an error, simply add another note below and indicate the error, correcting it.

THAT’S IT!

You can now sit down to personalize SOS and begin to use it every day. Remember, our goal is to spend more time interacting with students and less time doing paperwork. SOS will help you achieve that goal.

Also, please keep your entries accurate. We can run reports on all data but want the data to be as accurate as possible.