

CardSmart Training

Sending a Progress Report Campaign

CardSmart Progress Report Campaigns allow you to gather feedback from faculty to help determine which students may need intervention.

1. Click on the **Campaigns** tab. Then click to **Create New** Progress Report Campaign.



2. Name your Progress Report Campaign and write a message to the professors. When finished, click **Save and Next: Choose Students**.

Progress Reports > Create New

<p>Step 1: Name & Message Name your Progress Report Campaign, and provide a message for professors.</p>	<p>Name of Campaign <input type="text" value="Report Campaign for Spring 2015"/></p>
<p>Step 2: Choose Students Choose all-students, subset of students, or classes that are to be monitored.</p>	<p>Email Subject <input type="text" value="Spring Progress Report Campaign"/></p>
<p>Step 3: Define Behavior Define how your Progress Report will behave with thank you notes and expiration dates.</p>	<p>Email Message Dear Professor, Please take a few minutes to give us feedback on the students in your classes. The feedback you give will be used to help identify those students who may need some extra attention or resources. The sooner we identify and engage those at-risk students, the sooner we can get them the help they need. Your help is much appreciated. Please respond no later than February, 14, 2015. Sincerely, <u>Advisor</u></p>
<p>Step 4: Confirm Confirm the students enrollments which are the target of the Progress Report campaign.</p>	
<p>Step 5: Send & Complete Your Progress Report Campaign has been sent to instructors.</p>	

[Save and Next: Choose Students](#)

3. **Choose Students.** You can select all students, a subset of students, or certain classes that are to be monitored. Most often, you will select a specific group of students. Once you do that, the search box will open. Select **Switch to Advanced Search** so that you may filter either by **student** or by **course section**. ... When finished, click **Define Behavior**.

How would you like to select which students receive progress reports? The following 3 selection methods offer the power to drill down into a particular student/class or scale to the entire campus:

- All Students Active for Academic Term** : Send requests for all students active for the Fall 2014 term. This includes all students who are active in their courses (i.e. not dropped). This will include everyone in your GradesFirst environment, and **is not** restricted by any requirement other than academic term.
- Select Specific Students and Courses (< 2000 students)** : Send requests for specific students filterable by any condition within GradesFirst. You can also choose to send to specific course sections. By choosing both a list of students and a list of courses, you can select specific students in a specific course.
- Select Cohorts of Students and Courses (> 2000 students)** : Send requests to cohorts of students filterable by any condition. Differs from the "Specific Students" above since you will not choose specific students or specific courses. In the "Confirm" stage, you will see a sample of students and courses you chose.

Specific Students and Courses

To select your specific students or courses below, use the filters to search. Then use the "Add" buttons to move the selected to the right side. Only students or courses moved to the right will be used.
If you chose **both students and courses**, then the campaign will only be sent to "selected students in selected courses."

4. **Define Behavior.** Define how your Progress Reports will behave with thank you notes and expiration dates. **Exclude Students Requested Since:** This prevents new student request from being sent to professors who have already received a request since the date you provide. **Expire Professor Links On:** This sets a deadline by which the professor will no longer be able to respond. You can select to have a thank-you note sent to the instructor upon completion of the progress report.

Exclude Students Requested Since
Prevent new student requests from being sent to professors who have already received a request since the below date.

11/28/2014

Expire Professor Links On
Prevent professors from responding to the campaign after the below date.

02/06/2015

Send Thank You Message to Instructors upon completion?

Back : Choose Students Next : Confirm

5. **Send and Complete.** This final screen summarizes the information you have provided, detailing how many requests will be sent to professors (and for how many students.) You can review the list to be sure it's accurate. The final step is to select **Send & Complete**.

Based on your student selection(s), GradesFirst will send 0 evaluation requests for 0 students in 0 sections to 0 professors. Below is a list of all the evaluation requests that will be sent. Please review this list to ensure all desired students and courses are included.

EVALUATION REQUESTS TO BE SENT

STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
No students matching campaign student criteria.					

You **have not** selected to send a follow up thank you E-mail to professors.

Back : Define Behavior Next : Send & Complete