Advisors Log In to Advising Case Management system via a link on the IT Services/ Campus Administrative Systems page at [https://www.umb.edu/it/admin_systems/advising_case_management](https://www.umb.edu/it/admin_systems/advising_case_management) using umb.edu Single Sign-On credentials:

- If logging in for first time, select the “Single Sign-On” option shown at bottom of Log In screen:

- After first time Log In, the Single Sign-On screen below will appear for entering Single Sign-On credentials:
Note: In the Advising Case Management system there are two types of Cases being managed by Advisors...

1. The Student’s overall UMB Advisee Case – this is the Case that manages the Advisors’ relationship with the Student throughout their academic journey at UMass Boston.

2. The Student’s UMB Early Alerts Cases – these Cases are Term specific and hold Mid Term Early Alert records for those Classes requiring an Advisor’s intervention and outreach to the Student.

The following Diagram outlines the connections between the Student Contact, their Advisee Case and their Mid Term specific Early Alert Cases and Class alert records:

On Log In, Advisor is taken to their UMB Advisor Dashboard that provides high-level summary of activity for these different types of Cases, including status and easy click-thru to detailed Case information:
The **Home** tab is used to navigate to various items from the Advisor’s Dashboard:

![Home Tab](image)

The **History** tab at bottom of screen allows Advisor to easily access list of recently viewed pages and Students:

![History Tab](image)

The **Cases** tab provides a list of **My Advisees** for Advisor to select from:

![Cases Tab](image)
Note: By default, Cases are listed using Case Numbers in ascending order. To change this default, choose desired column and order and select the “Push Pin” icon to reset that default:

Using My Advisees list, Advisor can select Advisee Case Number to see Student’s All Early Alerts (not Term specific):
Using My Early Alert Cases, Advisor can select from list of (Term specific) Early Alert Cases that include Alert Colors with Green = Positive/ Satisfactory and Red = Negative/ Caution or Failing alerts requiring Advisor intervention and outreach:

* Clicking on a Case Number opens up that Student’s Early Alert Case detail information.
* Clicking on a Student’s Name opens up their Contact detail information.

Interactions section allows Advisor to:

> Create Case Comment from meeting or conversation with Student regarding their Early Alert Case:
Create **Post** to share update with another Advisor regarding their interactions with Student:

**Note:** **Posts** can only be shared with other users set-up in Advising system. Typing “@” in text box followed by that user’s name (no spacing) identifies who to share the Post with:

Create individual **Email** to send to Student or another Advisor in system regarding the Early Alert Case:
Create a **Task** for themselves or another Advisor in system that relates to the Student’s Early Alert Case:

**Note:** Tasks created from the Advisor's Dashboard screen are NOT tied to a Student’s Early Alert Case, but can be used by Advisor to create more general tasks for themselves for tracking purposes (e.g. distribute email reminder to caseload re: Add/Drop deadline by end of week, etc.)

**Change Status** of Student’s Early Alert Case:

**Note:** Early Alert Cases must be closed (manually or systematically) at end of Term to remove it from an Advisor’s **My Early Alerts** list. *Closing an Early Alert case also removes it from any of the other Advisors on that Student’s **Case Team**.*
**Early Alerts** section allows Advisor to...

- **View list of Student’s Early Alerts** for that Term:

  *Clicking on **Early Alert Number** opens up **Class** detail information related to Student’s Early Alert Case:*
*Clicking on Instructor name opens their Contact detail information and allows Advisor to view a Related list of Early Alerts by Instructor:

**Related Cases section allows Advisor to...**

- View Student’s Term related Early Alert Case and their overall Student Advisee Case:

**Note:** If there are NO alerts generated for a Student for a specific Term, there will NOT be an Early Alert Case created for that Student in the Advising Case Management system.
Global Settings located in top right hand corner of screen allows Advisor to...

- Change the look of their display screens:
  - **Comfy** setting provides spacious view with labels on the tops of fields and more space between page elements.
  - **Compact** setting provides a denser view with labels to the left of fields and less space between page elements.

- Select Favorites to tag frequently used pages:

  - You don't have any favorites yet, but you should add some! Favorites are shortcuts to the things you use frequently in Salesforce. When you're on a record, dashboard, or something else you like, click the star.

- Log out of the Advising Case Management system:

- If there are questions or additional assistance is needed with the Advising Case Management system, please contact the Support team at: **ACMSupport@umb.edu**