

INSIGHT (PHAROS 360) ADVOCATE MANUAL

By Jeff Martin-Moreno
MCLENNAN COMMUNITY COLLEGE
Updated 11/9/2015

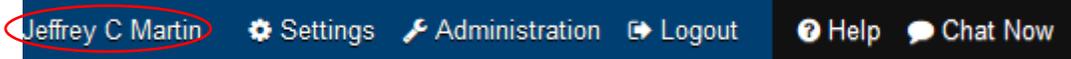
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Saving your Email Signature

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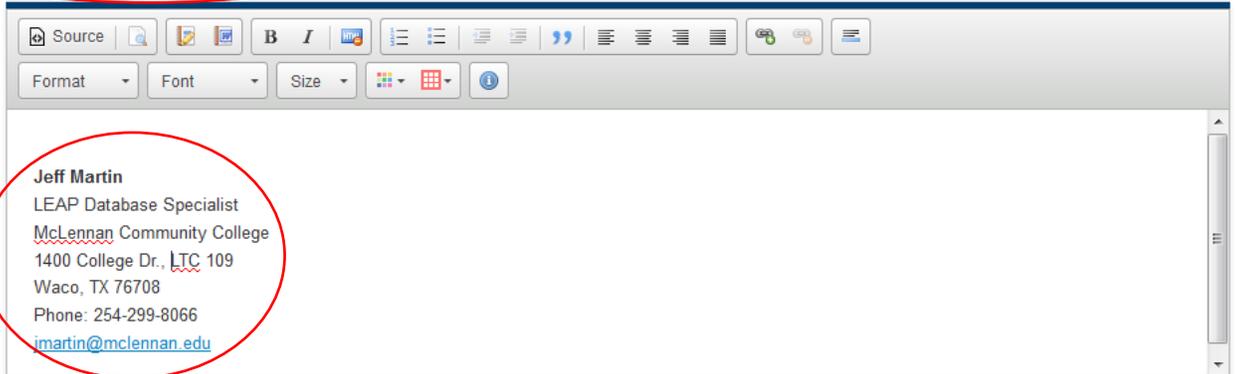
1. Log into Pharos 360 at <https://mclennan.pharos360.com>.
2. Near the top right corner of your browser bar, click Settings.



3. Scroll down to Personal E-mail Signature.
4. Type your signature block as you would like it to appear in emails from the Pharos 360 system.
5. Click Save Signature.

The following text will replace the placeholder SIGNATURE in email templates sent by you to both faculty and students.

#3 Personal E-mail Signature



#4

#5 Save Signature

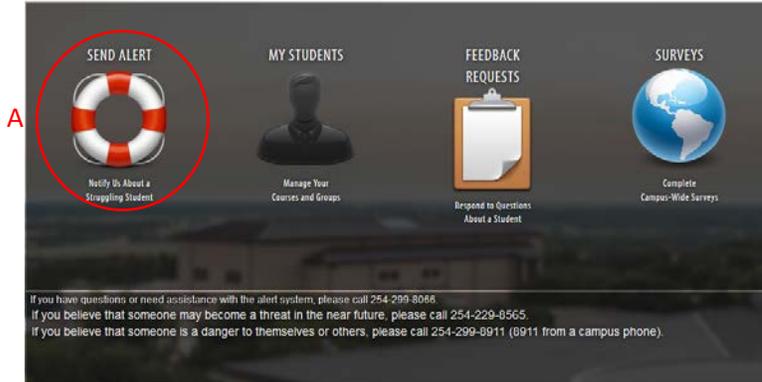
6. Congratulations! You have updated your email signature!

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Sending an Alert (Making a Referral)

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1. Log into Insight at <https://mclennan.pharos360.com> .
2. From the opening screen of Insight **A.** click on the Send Alert life preserver icon in the middle of the screen, or **B.** from any screen in Insight, click Send Alert at the top left corner of your browser window.



3. Enter the student's name or student ID number in the search bar in the middle of the screen and click Search.

Search for a Student to Refer [edit]
(available fields: primary login id, email, sis # or name)

Search

Primary Login ID	SIS #	Student Name	Student Email	Actions
Please enter a search above.				

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4. Find the student in the search results and click Send Alert under the Actions heading.

Search for a Student to Refer [edit]
(available fields: primary login id, email, sis # or name)

Search

Primary Login ID	SIS #	Student Name	Student Email	Actions
9999999	fake_student	Jamaal Burger Williamson	jamaal@pharosresources.com	Send Alert

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5. Enter your phone number.
6. Enter your department, division or program.
7. Select your relationship to the student

Your Information (* denotes required)

Please provide the following information so that we can give you updates about the progress of this referral and understand your relationship to the student you are referring. We may contact you if we have further questions. Any information you provide in this referral may be shared with appropriate college staff under the restrictions set forth by FERPA.

[edit]

* Phone Number: **#5**

* Department/Office: **#6**

* Relationship to Student: **#7**

[edit]

I would like to receive progress updates regarding this student:

Jamaal Williamson's Information [View More](#)



Primary Login ID: 9999999 SIS #: fake_student

If you have contact information for this student that may not already be stored in the university's student information system, please click here to enter it.

[edit]

8. Type a description of your concern for the student and click Submit Referral.
9. Congratulations! You just sent an alert (made a referral)!

Referral

Please type a short description your concern for this student below.

[edit]

Questions marked with * are required.

1) Please type a short description of your concern for this student. *

#8

Thank you for taking the time to complete this form. We depend on your referrals to identify and support students who need help.

[edit]

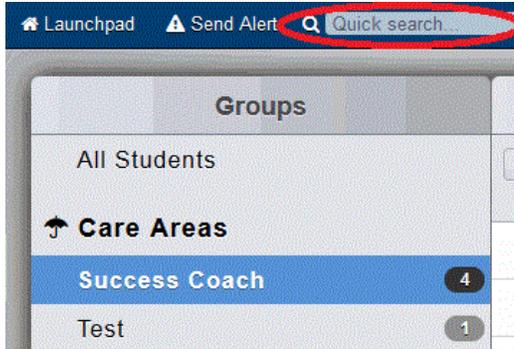
#9

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Opening a Case

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1. Log into Insight at <https://mclennan.pharos360.com>.
2. In the quick search bar at the top left of your browser begin typing the student's name or student ID number.



3. The student's name will appear in a quick list. Click on the student's record in the quick list to open the student's record.



4. After the student's record loads, click the "Open New Case" button to the right of the student's picture.



5. You will see the student's information to the left and an area to enter notes about the case to the right.
6. Select the care area.
7. Select an Advocate to assign to the case.
8. Time spent is a required field.
9. Type a narrative of the reason for the case being opened.
10. If you want to share the case opening with other partners (if you want others who have access to be able to see the referral *(all details including notes)* check the box for this option.
11. Click Open New Case.

The screenshot shows a form titled "Open New Case" with two main sections. The left section, labeled "#5 Jamaal Williamson's Information", contains fields for Primary Login ID (9999999), SIS # (fake_student), Preferred Name (Jamaal), Birth Date (02/02/1988), E-mail (jamaal@pharosources.com), and Home Phone (123-456-7890). The right section, titled "Open New Case", contains a dropdown for Care Area (labeled "#6"), an Advocate dropdown (labeled "#7" with the text "waiting for Care Area selection..."), a Time Spent field (labeled "#8" with "in minutes"), a large text area for Details (labeled "#9"), and a checkbox for sharing the case with other campus partners (labeled "#10"). An "Open New Case" button is at the bottom right.

12. If you did not choose to share the case opening, congratulations! You just opened a new case! If you did share the case opening, please continue.
13. After opening the new case you may share the case opening with **A.** another whole care area, **B.** someone in the student's circle of care, or **C.** any user in the Insight system. Clicking in the Care Areas search box will bring up a list of care areas to choose from. In the other two search boxes you may search by first name, last name or MCC ID number. When you are done adding people to share the case opening with, **D.** click the X in the top right corner to close this dialogue box.

A notification card for a case opening. It features a circular profile picture of a woman, the name "Jamaal Burger Williamson", and the text "Opened Case". Below this is a lock icon and the text "Practice sharing a case opening." At the bottom, it says "Jeffrey C Martin in Success Coach on December 10th, 2014 11:35am". A red "D" with a close button icon is in the top right corner.

A "Sharing" dialog box with three search boxes: "A Care Areas" (with a "Click to Select" button), "B Circle of Care" (with a "Type a Name" input), and "C All Users (* denotes student)" (with a "Type a Name" input). A red "D" with a close button icon is in the top right corner. Below the search boxes is a note: "As the author of this log entry, you may add or remove sharing permissions above. The affected users will be notified of any changes you make."

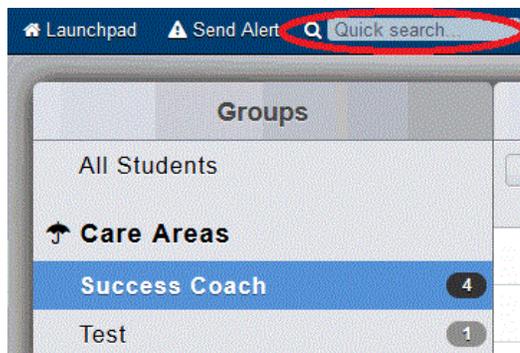
14. Congratulations! You just opened a new case!

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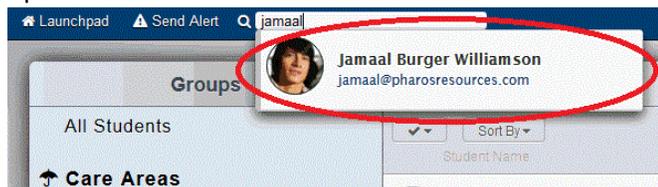
Recording a Contact

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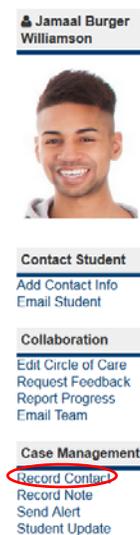
1. Log into Insight at <https://mclennan.pharos360.com>.
2. In the quick search bar at the top left of your browser begin typing the student's name or student ID number.



3. The student's name will appear in a quick list. Click on the student's record in the quick list to open the student's record.



4. After the student's record loads, click the "Record Contact" button in the Collaboration section below the student's picture.



5. Keep Private check box: The default is for people in your own care area, and others you might decide to share the contact with, to be able to see *all* of the details of your contacts *including the text of the notes*. Checking this box hides the contact details not only from those you share the note with, but also *from your own care area*. For this reason, best practice is *not* to keep contacts private and to share only contacts that the recipient is authorized to see.
6. Select the type of contact.
7. Type your notes for this contact with the student.
8. Select your care area.
9. Time spent is a required field.
10. If you want to share the contact with other people on campus check this box. Remember that if you share the contact with someone, they will be able to see your notes unless you mark the contact as private. However, if the contact is private, others in your care area will not be able to see the contact details either.
11. Click Add Contact Report.

#5 Keep Private? (select this if you want to be the only one who can see this entry)

Type: #6 [edit]

Report:

Care Area: #8

Time Spent: #9 minutes

#10 I would like to share this contact with other campus partners

#11 or return to student

12. If you did not check the box in #10 to share this contact with others, you are finished! If you chose to share the contact please continue.

13. After adding the contact report to the student's record you can share the contact with **A.** another entire care area, **B.** someone in the student's circle of care, or **C.** an individual user in the Insight. Clicking in the Care Areas search box will bring up a list of care areas to choose from. In the other two search boxes you may search by first name, last name or MCC ID number. When you are done adding people to share the contact with, **D.** click the X in the top right corner to close this box. You are finished!

The screenshot shows a contact record for Jamaal Burger Williamson. The contact type is 'Practice' and it was created by Jeffrey C Martin on December 10th, 2014 at 10:30am. Below the contact details is a 'Sharing' section with three search boxes: 'Care Areas', 'Circle of Care', and 'All Users (* denotes student)'. Each search box has a text input field and a search icon. The 'Care Areas' search box is annotated with a red circle and the letter 'A'. The 'Circle of Care' search box is annotated with a red circle and the letter 'B'. The 'All Users (* denotes student)' search box is annotated with a red circle and the letter 'C'. In the top right corner of the sharing section, there is a red circle with a white 'X' inside, annotated with the letter 'D'. Below the search boxes, there is a note: 'As the author of this log entry, you may add or remove sharing permissions above. The affected users will be notified of any changes you make.'

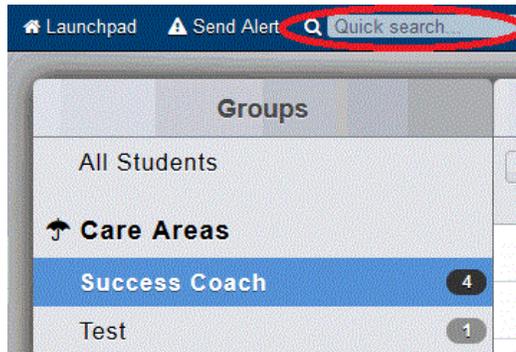
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Recording a Note

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Recording a note works much like recording a contact but has a different purpose. Use a note when you don't need to email, alert, report progress or ask for feedback and you didn't make a direct contact, but you'd like to add information that will help your care area or other care areas (e.g. student dropped a class or withdrew from school, you learned information through conversations with faculty/staff and think it is pertinent to the student's success).

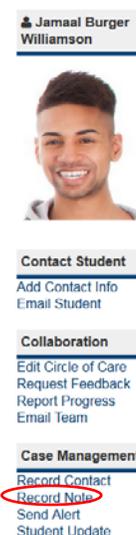
1. Log into Insight at <https://mclennan.pharos360.com> .
2. In the quick search bar at the top left of your browser window, begin typing the student's first name, last name or student ID number.



3. The student's name will appear in a quick list. Click on the student's record in the quick list to open the student's record.



4. After the student's record loads, click the "Record Note" button in the Collaboration section below the student's picture.



5. Keep Private check box: The default is for people in your own care area, and others you might choose to share the note with, to be able to see *all* of the details of your notes *including the text of the notes*. Checking this box hides the note details not only from other departments on campus, but also *from your own care area*. For this reason, best practice is *not* to keep notes private and to share only notes that the recipient is authorized to see.
6. Type the information you would like to add to the student's record.
7. Select your care area.
8. Time spent is a required field. Please record the amount of time you spent recording the note.
9. If you want to share the note with other people on campus check this box. Remember that if you share the note with someone, they will be able to see your notes unless you mark the note as private. However, if the note is private, others in your care area will not be able to see the note details either.
10. Click Add Note.

#5 Keep Private? (select this if you want to be the only one who can see this entry)

Note:

The screenshot shows a rich text editor interface. At the top, there is a toolbar with various icons for source, undo, redo, bold, italic, link, bulleted list, numbered list, indent, outdent, quote, link, unlink, and a help icon. Below the toolbar are dropdown menus for Format, Font, and Size, followed by a color selection tool and a table grid icon. The main area is a large white text box, which is circled in red and labeled #6.

Care Area: #7

Time Spent #8 minutes

#9 I would like to share this note with other campus partners

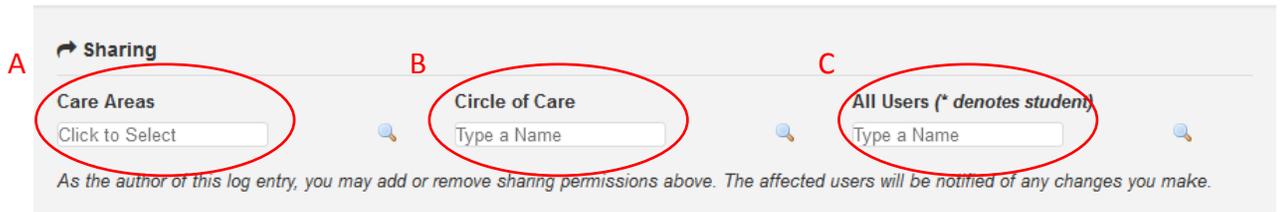
#10 or [return to student](#)

11. If you did not check the box in #9 to share this note with others, you are finished! If you chose to share the note please continue.

12. After adding the note to the student's record you can share the note with **A.** another whole care area, **B.** someone in the student's circle of care or **C.** any user in the Insight system. Clicking in the Care Areas search box (**A**) will bring up a list of care areas to choose from. In the other two search boxes you may search by first name, last name or MCC ID number. When you are done adding people to share the note with, **D.** click the X in the top right corner to close this box. You are finished!



Dec 10
Jamaal Burger Williamson
Note
Practice note
Jeffrey C Martin in Test on December 10th, 2014 2:08pm



A Care Areas
Click to Select

B Circle of Care
Type a Name

C All Users (* denotes student)
Type a Name

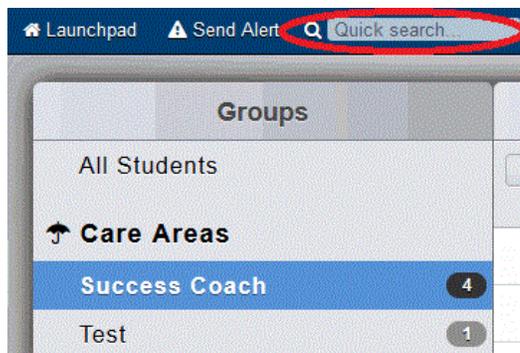
As the author of this log entry, you may add or remove sharing permissions above. The affected users will be notified of any changes you make.

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Emailing a Student

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1. Log into Pharos 360 at <https://mclennan.pharos360.com> .
2. In the quick search bar at the top left of your browser begin typing the student's name or student ID number.



3. The student's name will appear in a quick list. Click on the student's record in the quick list to open the student's record.



4. After the student's record loads, click the "Email Student" link to the in the Contact Student section below the student's picture on the left side of the page.



5. Select your care area.
6. Time Spent is a required field.
7. Template field is optional and can be used to store templates of emails that you send often.
8. Enter a subject in the subject line.
9. Type the body of the email. If you are using a template, update the body of the email as needed.
10. If you want to share a record of this email with other partners check the box for this option.
11. Click "Send email."

The image shows a screenshot of an email composition interface. The fields are annotated with red numbers:

- #5**: Points to the "To:" field containing the email address "jamaal@pharosresources.com".
- #6**: Points to the "Care Area:" dropdown menu.
- #7**: Points to the "Time Spent:" field, which is set to "minutes".
- #8**: Points to the "Template:" dropdown menu.
- #9**: Points to the large text area for the "Body:" of the email.
- #10**: Points to the checkbox labeled "would like to share this email with other campus partners".
- #11**: Points to the "Send email" button.

At the bottom, there is a "Subject:" field and a "Cancel" button next to the "Send email" button.

12. Congratulations! You just emailed a student from Insight!

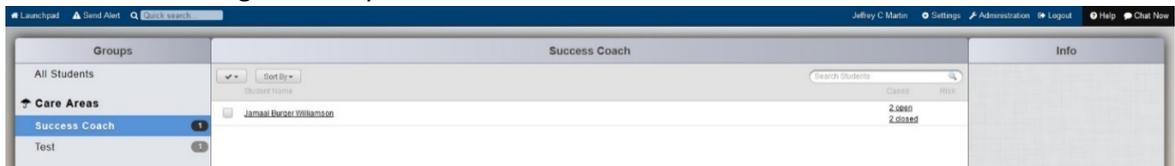
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Enter a Student Update

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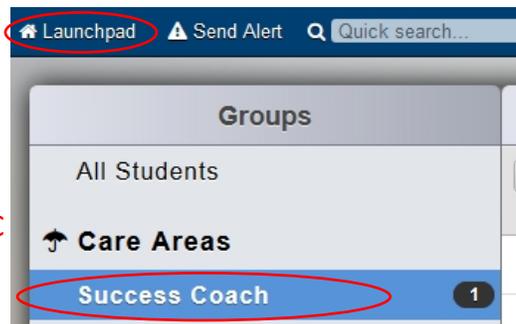
A student update is a way to enter repetitive information that is collected for each student or for each visit by a student to your department (care area). Depending on your department's policy, you may complete a student update for each visit you make with a student, only after their first visit, or at specific times during a semester. This can be done very efficiently by selecting several students as shown in #4 of these instructions and filling out several questionnaires in a row. It should only take a minute or two per student update. If there is no student update that is compatible with your needs, please ask your department Director or Coordinator to work with the Insight site administrator to develop a form your purpose.

1. Log into Insight at <https://mclennan.pharos360.com>.
2. Insight should open to your home page, a list of students assigned to you. Click on your care area to see students assigned in to you in that care area.

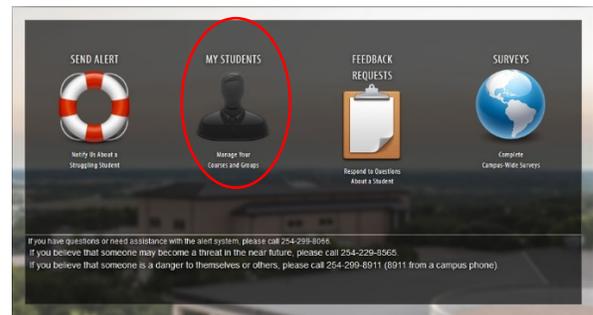


3. If you are already in Insight but not at your home page: **A.** click Launchpad in the top left corner of the browser window. **B.** Click My Students. If you see a "home" link, that will also take you to your student list. **C.** Click a class or care area to see students assigned to you in that area.

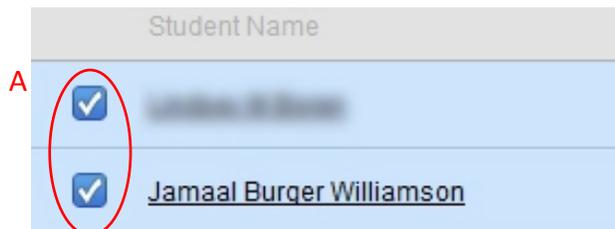
A



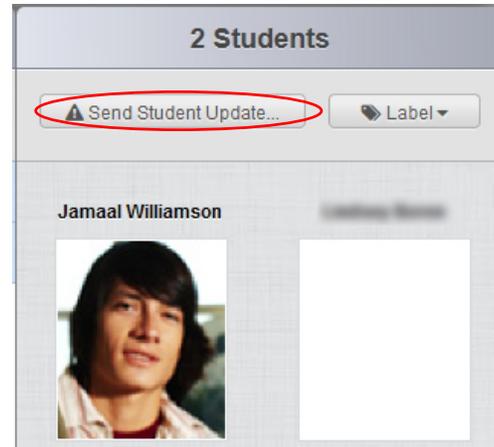
C



4. **A.** Check the box(es) next to the student(s) for whom you need to complete a survey. **B.** If you select one student you will see the student's picture with four choices *below* it. **C.** If you select more than one student you will only have two choices *above* the students' pictures. Click the Student Update or Send Student Update button.



A



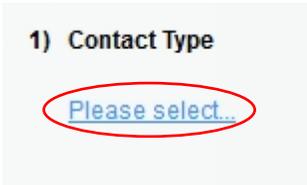
5. You can send a student update on an individual student from within the student's record by clicking on Student Update in the Case Management section below the student's picture on the left side of the page.

The following Instructions use the Success Coach Follow-Up student update as an example. Student update forms may vary by department, if one is available for your area.

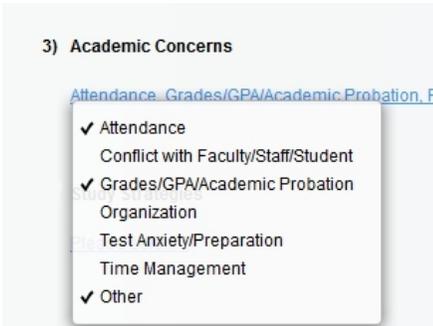
6. Click on the student update form you wish to complete.



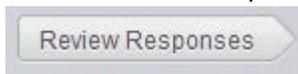
7. Complete the questions in the questionnaire. Click on the link for the first answer to see all the possible choices for that question.



8. For each question, check all answers that apply. All multiple choice questions are optional so you can skip the ones that don't apply to the student contact.



9. For questions that you answered “other,” there will be a text box at later in the form for any additional details you would like to provide.
10. Click the Review Responses button at the top right of the questionnaire form.



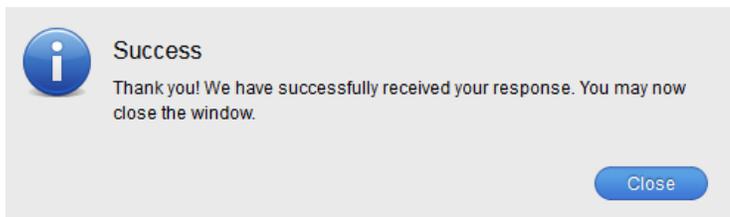
11. Review your responses. If you need to edit any responses, click the Edit Responses button at the top left.



When you are satisfied with your responses, click the Submit Responses button at the top right.



12. Click Close.



13. Congratulations! You have submitted an update for a contact with a student!

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Rachel Elam

March 17, 2015 10:30

Follow

Each individual user has the option to create their own list of statuses that they can assign to their students' cases in order to keep track of progress.

These are "notes" designed to allow you, and other users, to see at a glance what the next step is in your interaction with the student. A student's case status can be changed as often as needed. When a status is changed, it will create a log entry.

To create your own Personal Statuses, click on **Settings** in the top menu bar. Once on the **Settings** page, scroll down to the "Personal Status Settings" header.

Create your first personal setting by typing the status in the text box and clicking on the green "+".

To delete a personal status, click the red "-" button.

Examples of Personal Statuses:

1. Waiting for a Reply
2. Mid-semester Follow-Up Needed
3. Finished for the Semester
4. Daily Follow-up Needed
5. Meeting with Regularly
6. Need New Contact Information

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