Good Practices on the Transition from In-Person Advising to Remote Advising

We wanted to share some good practices as you think about transitioning from in-person advising to virtual advising using the Pathways platform. Professional advisors in the Dietrich School, Swanson School, and the School of Computing and Information have utilized a number of these practices quite successfully.

1) Communication is key! Many advisors have emailed all of their students about the method by which they will be meeting with students – Skype, Zoom, Teams, or phone. This will help to avoid confusion and make expectations clear. Be sure to make phone a possibility as some students may not have access to the technology needed to support Skype or Zoom.
   a. Here is a template message that advisors in the Dietrich School Advising Center sent to all of their assigned students. No sense in re-inventing the wheel by crafting your own message! You could also consider sending a text message to your students asking them to check their Pitt email for an update on academic advising for the rest of the term. This is very easy to do via Pathways, but let me know if you have any questions.
   b. You’ll notice that the Dietrich School also allows students to complete a Qualtrics survey if neither Skype nor phone will work. Here is a copy of this survey, if you’d like to consider this approach.

2) Make sure your technology is ready to go. Whether you are using Zoom, Skype, or Teams, we recommend downloading the software to make it as easy as possible.
   a. Zoom resources are available here:
      i. Download the Zoom Client for Meetings to make it as easy as possible to connect for scheduled and ad hoc meetings.
      ii. Download the Zoom Plugin for Microsoft Outlook in order to turn a regular outlook meeting into a Zoom meeting (instructions for how to do this are below).
   b. Skype resources are available here:
      i. Download the Skype for Business application to make it as easy as possible to connect to scheduled and ad hoc meetings and turn a regular outlook meeting into a Skype meeting.
   c. As “Zoombombing” increases, here are some resources developed by Zoom on how to protect your advising session and here are some resources developed by Pitt on Zoom Etiquette and Best Practices.

3) Modify your availability. In each active or future availability you have, modify the “Special Instructions for Student” to re-iterate what you indicated in your email to students. Students will see this information when they schedule appointments with you.
   a. There is now the ability to add a phone number or URL when you create your availability. Students will see this information in the confirmation email as well as email reminders (see page 6 of the Pathways Training Documentation for screenshots of how this looks).
   b. Below is what advisors in the Dietrich School Advising Center are encouraged to use in their “Special Instructions for Student”:
“PLEASE NOTE: I am currently working remotely until further notice and only available via Skype for Business, phone, and email. Please refer to my email for instructions on downloading and using Skype for Business prior to your appointment. If you are unable to use Skype for Business, please indicate in the comments that you wish to have your appointment by phone, including a telephone number where I can reach you.”

4) Ask students to schedule appointments as usual, through the app/web or via an appointment campaign. Note that students will not be able to schedule appointments at the time of their scheduled classes, even if their classes are no longer happening at that time. If students want to meet when their classes are scheduled, you will need to manually schedule those appointments. Instructions are on page 9 here.

5) You can easily connect with students via Skype for Business or Zoom. Regardless of the platform you use, there are two good ways to connect with your students. (Detailed instructions on how to do both of these are at the end of this document.)

   a. Ask students to log-in to the respective platform a few minutes before their scheduled appointment time. Then search for that student in the search box.
   b. Convert all of your outlook calendar meetings to Skype or Zoom and invite the student. Then you and the student will just need to “Join Skype Meeting” or “Join Zoom Meeting” to connect.

6) As much as possible, don't forget to approach your virtual advising interaction the same way you do a face-to-face session. This includes replicating your greetings, holistic conversations, and referrals as necessary. Our students might be feeling worried and we know that advisors can help them through this difficult time with good questions and care. Thank you for all that you do!

7) Let the Pathways team know if there’s anything we can do to help you. We would be happy to temporarily convert your location to indicate that your appointments will take place virtually.

We are here to support you in supporting our students. Please reach out if you need anything. Stay safe and healthy!

Instructions for connecting with students via Skype for Business

1. Ask students to log-in to the respective platform a few minutes before their scheduled appointment time. Then search for that student in the search box.

   i. Here’s how this looks in Skype:
2. Convert all of your outlook calendar meetings to Skype and invite the student. Then you and the student will just need to “Join Skype Meeting” connect.

1. Click Skype Meeting at the top of the outlook appointment.

2. Once you convert the meeting to a Skype Meeting, enter the student’s email address in the “To” box. Then, hit send and this meeting will be sent to the student.
Instructions for connecting with students via Zoom

1. Ask students to log-in to Zoom a few minutes before their scheduled appointment time. Then search for that student in the search box.

   a. You’ll click on “Meetings”

   b. Click the blue “Start” button.

   c. Click the “Invite” button at the bottom of the screen. Type the name of the student with whom you will be meeting (not that you type first name first).

   d. Click the student’s name and click “invite”.

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2. Convert all of your outlook calendar meetings to Zoom and invite the student. Then you and the student will just need to “Join Zoom Meeting” connect.

   a. Click on “Schedule a Meeting Zoom”

   b. After launching the dialog box below, click on “Continue”
c. Click “Invite Attendees”

d. Enter the student’s email address in the “To” box. Then, hit send and this meeting will be sent to the student.
You haven't sent this meeting invitation yet.
This appointment conflicts with another one on your calendar.

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