**Virtual Advising Training Guide**



Let’s first clarify – sites are different in terms of advisor-student ratios, culture, students, front-desk staff, etc. So please collaborate and determine the best course of action regarding availability and options for advising. When that’s determined, communicate that to your students. Use clear and concise language and be prepared for when students ask questions. Below is the official message for university leadership. Use this as primary guidance when determining how you can best support your students, either via phone or Zoom.

**Official message from university leadership (3-20-2020)**

This message to all deans, advisors, college life coaches, mapping coordinators, faculty and instructional staff has been approved by Dr. Sally McRorie, Provost and Executive Vice President.

We have reviewed the advising guidelines distributed last week in light of recent developments regarding working remotely, the move to online classes for the rest of the term, and ongoing guidance from the CDC.  It remains very important for advisors and others involved in student academic services to continue outreach to students and to provide clear information about how students may contact you for help with registration and other academic matters.

While the University remains operational at this time, advisors should be given the option of working remotely, and it is not an expectation that units provide walk-in or other face-to-face advising sessions.  We encourage each advising site to provide as much flexibility as possible for advisors who wish to work remotely per the guidance from Human Resources that was distributed on March 16.

We understand that these are challenging times for everyone and circumstances are changing rapidly.  The more we can do to support students and each other the more successfully we will navigate this difficult situation.

**Karen Laughlin**

Dean of Undergraduate Studies

Florida State University

**Conducting advising via the phone**

Though this happens already, especially at times between the semesters when the student is not on campus, phone is a perfectly suitable option for connecting with and providing advising services and support for your students.

*Addressing Limitations*

You will obviously be limited in showing the student resources that you would share in person, so please utilize your e-mail in both documenting the results of the meeting as well as sharing pertinent links, attachments, and web resources.

*Providing Accommodations*

It’s possible that your student may have a limitation in their ability to hear or they may be in a place that has bad service. Advisors are encouraged to be accommodating. Do not end a meeting and move on to another task or student meeting if a call is dropped. Do not move a phone meeting to an e-mail transaction, as e-mail diminishes the ability advisors have to forge and sustain an authentic connection with the student.

*Being Personable*

Just like with in person meetings, the advisor may have to convey bad news to a student as it pertains to their major, expected graduation timeline, or academic standing at the university. Advisors are to try to communicate with sensitivity around how the student would receive such message and use verbiage that is supportive, encouraging, and solution-focused if and when possible. This may mean sharing the bad news and asking the student if they need time to process the given information.

*If using Campus Connect for phone meetings*

…You can put in your Campaign message that if a student prefers a phone meeting that they are to put the best number to reach them in the comments box when confirming their appointment.

…If conducting walk-ins or call-ins, you can post your main office number in your availability.

…be sure to notate the meeting type as phone.

*Check your VoIP voicemail while away from your office*

Centrex:

Dial 644-6245

Press # when attendant answers

Enter your 7 digit telephone number

Enter your passcode & follow the prompts to listen to your messages

VoIP:

Dial 645-9999

Press the # sign when attendant answers

Enter your 7 digit telephone number

Enter your password

Press # and follow the prompts to listen to your messages

To change voicemail greetings remotely via VoIP, follow the directions in the link above to gain access to the voicemail then press:

Option 4

Option 3

Option 1

Option 21

Record greeting then press #

*Using Google Voice instead of your personal number for phone outreach*

For staff working remote, calling students can still be effective for conducting meetings, especially for students with limited access to e-mail and internet. However, staff should be apprehensive to using their personal phone numbers when reaching out to students. Google Voice allows staff to set up a generic phone number to call students.

1. Visit voice.google.com and set up an account. If you already have a Google or Gmail account you can log in using your typical credentials.
2. Link your personal number with Google and pick a generic Google Voice number. This is the number students will see when you call them as well as the number they will use if trying to call you.
3. Once logged in and linked with your personal number, configure your preferences via Settings (see the image on the following page for reference)
	1. If you have audio (speakers and microphone) equipped on your computer, you can make outgoing calls without your phone.
	2. If you do not have audio equipped on your computer you can use your phone. Google Voice will call you first to connect you to the outgoing call.
	3. If a student uses this Google Voice number to call you, you will get a call from a “Scan Likely” number. Answer this and you will be prompted by the automated message to accept the call by pressing 1. You can screen the call too via Settings which would prompt the student to say their name over the phone and you then have the option to accept or reject the incoming call.



**Conducting Advising via Zoom**

Zoom offers a platform for face-to-face, chat, screen/file sharing, and audio aided conversations. This would be best utilized with walk-ins or a possibly more nuanced advising appointment with a student in jeopardy of being off-track, removed from major, or dismissed from the university. Sensitive issues like that necessitate a more personalized approach.

Note that although Zoom does offer camera and microphone connections, advisors can still use their office phone when selecting “join by audio”. Their phone number will not display to the student.

*If using Campus Connect for Zoom meetings…*

Be sure to notate the meeting type as Skype/Online.

You can also post the personal meeting room link (more instructions below) in your availability.

*Set up/login to Zoom via ITS website*

<https://Its.fsu.edu/zoom>

Click to sign in to Zoom and not Zoom for HIPAA.

You can also refer to the Zoom Quick Start Guide to reference various functions of the platform, some of which are covered here.



*Schedule a Zoom meeting via Outlook for upcoming individual appointments*

Staff have the option to schedule any meeting using Zoom.



1. Click New Appointment on the Home tab.
2. Click the Appointment tab and toward the right side of the platform you will see the option to create a Zoom meeting
3. If using this the first time, you will have to log in using the single sign-on function.
4. The calendar appointment will include Zoom invitation details such as the call-in number and the unique link to join the meeting. A student can be invited to this meeting but it is also encouraged to send this invite to their e-mail as well as a student may not “accept” the meeting and therefore may not see the meeting details.

*Use a Zoom personal meeting room – a static link for all of your students*

A personal meeting room allows an advisor to have a unique URL to their meeting. Staff can send this URL by clicking the “Copy the invitation” button and then pasting the message to students in e-mails or Campus Connect outreaches. See figure A on the following page for more details.

*Managing the Zoom Waiting Room*

When in the Personal Meeting Room tab, click “enable waiting room”. This will allow the staff to manage a virtual waiting room of students. Without this checked, everyone who has the link can join the meeting and everyone will be in the meeting at the same time. This way, an advisor can send a link out to students but still manage their appointments. Students can join the meeting early and when the staff is ready they can add the student to the room.

**See the image on the following page for setting up and managing your personal meeting room.**

*Setting up your Personal Meeting Room*

****This is where your personal meeting room preferences are managed. You can click “join now” at the top right to join the meeting. On the middle-right of the page is where you can click to copy the invitation and use the URL provided when sharing your meeting link with students. Toward the bottom is where you need to click “enable waiting room” to ensure that you can manage when you meet with a particular student.

 **After you’ve set up your room and sent out appointment details,
you can now meet with students via Zoom.**

*Managing the Waiting Room*

You have sent the personal meeting room link and now you have students click the link and arrive in your waiting room. For this example, Juana and Jennifer Lee are both waiting for advising. I can see them in the top right of the platform under “2 people are waiting”.

****The waiting room will populate in order of who attends first, so Juana clicked the link and entered the room before Jennifer Lee. This may be fine when handling walk-ins who receive first-come-first-serve advising, but if Jennifer Lee had an appointment prior to Juana you should see Jennifer Lee first.

*Moving a student from the waiting room to the meeting*

Note that no student can hear your audio or see you share a screen when they are in the waiting room.

When you hover over a student’s name you can “admit” them and this will have them enter the actual meeting space.

*Managing the Student Meeting*

You have some additional functionality toward the bottom of the platform. See below for more details.

****

**Mute –** this is where you can mute your audio

**Start Video –** you can elect (if you have a webcam) to share video

 **Invite –** you can invite others to the meeting (unnecessary assuming that you sent the link out to other students)

 **Manage Participants –** This opens the sidebar that allows you to see and manage who is in the meeting. This also shows your waiting room as well.

 **Polls –** not necessary for advising purposes

 **Share Screen -**  you can elect to share your screen during the meeting. This can be very beneficial as you may choose to show the student’s requirements report or show other essential websites or web resources.

 **Chat-** this opens up a sidebar for a text chat box. If you are using audio then this feature is not necessary.

 **Record –** you can record a particular meeting but this is probably not necessary either.

 **Breakout rooms –** Again probably not necessary.

 **End Meeting – This is where you will end the meeting for everyone both in the individual meeting and in the waiting room. It may seem logical at first to click this when done with a meeting with a student, but instead you need to manage them and remove them from the meeting, or they need to leave the meeting on their own.**

*Removing or moving a student currently in a meeting*

When a student is in your meeting, you can either put them back in the waiting room if it was a mistake or they aren’t ready/present, or you can remove them if the meeting is complete. Simply right-click the name of the student in the meeting and you can either move or remove them.

*In closing…*

Learning a new technology and teaching the student how to use it can be tough, especially in a short time frame. Practice patience and courtesy in this interim. Reach out to me directly at sjlloyd@fsu.edu and I’ll be more than happy to provide assistance. There are also videos on Youtube and Linkedin Learning that cover Zoom functions in full detail.