Student Work Lists

Overview

Work lists enable users to triage their workload by seeing which students need attention, creating specialized lists for proactive outreach, and quickly finding information on individual students.

When users log in, the student work list they will see depends on institutional settings. Some will have a list that is restricted by major. Otherwise, they will see a Welcome screen with instructions on how to create a list, view a watch list, or view reminders.

Welcome

Create a List

Use Lists to target a population of students.

Students will be automatically added and removed from the List based on the search criteria you select.

Once users have created at least one work list, they will see a default work list upon login, which will sort students by their last name. Clicking Go next to the search box without entering search criteria will display all students at the institution.

At Risk Accounting Majors

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Major</th>
<th>Risk</th>
<th>Cum. GPA</th>
<th>Notifications</th>
<th>Last Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bartlett, Tommia L</td>
<td>Accounting</td>
<td>Mod</td>
<td>3.0</td>
<td>3</td>
<td>Never Student Status: No action taken</td>
</tr>
<tr>
<td>Chanamurthy, Alaina</td>
<td>Multiple Majors</td>
<td>Mod</td>
<td>1.3333</td>
<td>3</td>
<td>Never Student Status: No action taken</td>
</tr>
<tr>
<td>De La Cruz, Elmer</td>
<td>Finance</td>
<td>Mod</td>
<td>0.0</td>
<td>3</td>
<td>Never Student Status: No action taken</td>
</tr>
</tbody>
</table>
Users can create student work lists or search for individuals on this page. They may also sort the default list by risk, cumulative (or other) GPAs, number of notifications, and last edit to profile.

To search for an individual student, enter all or part of a name or Student ID in the search box and click Go. Once the user has created a work list, he or she has the option of searching the current list using the search box just above the list.

Users can create multiple work lists that serve as a filter for students.

To create a student work list:

1. Open the Student tab. Click Create a new list.
2. The Refine List screen opens. This contains multiple criteria to filter your new list, including Major, Concentration, Degree, Risk, Student Classification, Student Status, Enrollment, # of notifications, et cetera. Lists can also be filtered by institution-defined advising groups. The filters are categorized to make them easier to find.
3. Select the criteria from the options provided by clicking on a category and setting ranges. You can select multiple criteria to create your work list. **Note:** Filters are additive! Students must match all criteria to be placed on the work list.

4. If necessary, set the date range on your filter.

5. Once finished making work list selections, click **Apply Selections**, keeping in mind that it is possible to narrow your criteria too much. When this happens, no students will appear on the work list.

**Tip!** The filter for success markers shows the entire institution’s success markers, not just ones for a selected major. Check to make sure the success marker you’ve chosen corresponds to the other criteria on your filter or you will get zero results.

Once the user has narrowed a work list, they can save it by entering a name and clicking **Save**.

The work list will display 25 students per page alphabetically by last name. At any time, sort the work list by clicking on a column title. Clicking it a second time will change sort direction.
To edit a student work list:

1. Click on the list name.
2. Click **Edit**. The Refine List menu will appear. Select criteria and click **Apply Selections**.
6. Once finished with editing, click **Save** to update the work list.

To delete a student work list, simply click the **X** next to any work list in the Saved Work Lists area. A confirmation message will appear; click **Delete** to delete the work list.

**Watch List**

The Watch List is a specialized type of student work list. Whereas most work lists are created by finding students that match criteria and will dynamically be updated based on that filter criteria, the Watch List is an ad hoc collection of students who do not necessarily have to have matching criteria in common. Students will stay on the watch list until removed by the user.

To add a student to your Watch List, simply click the **Add to watch list** link.

Users can add students to their Watch List at any time. To see the list of students on your Watch List, click the Watch List tab on the Students page.
Students on the Watch List can be viewed and worked with in the same manner as any other student on a work list. Users can sort the Watch List by any of the columns on the page, though students will be listed by the number of notifications on their profile by default. Students may be removed from the Watch List at any time by clicking Remove from watch list.

Users can export work lists and watch lists for action campaigns. To do this, click Export List to CSV on either the work list or watch list page of your choice.

Extensive student information is included, including contact information, making this feature helpful for large-scale outreach campaigns. A maximum of 2000 students may be exported at a time; your institution will set the limit. If there is more than the permitted number of students in your list, the Export List to CSV link will not work. The number of students that may be exported at one time is limited to avoid slow response time.

Tip! If you need to export more than a few thousand students, use the last name filter to break the list up alphabetically, then merge the lists after exporting.