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ACCESSING ONTRACK

To access **OnTrack** open a web browser and navigate to **OnTrack.pace.edu.**

You can also aces **OnTrack** through the information page [www.pace.edu/**OnTrack**](www.pace.edu/OnTrack) .

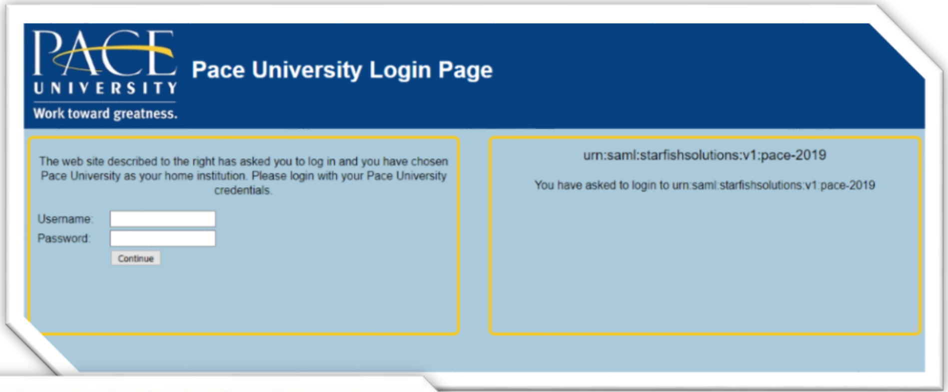
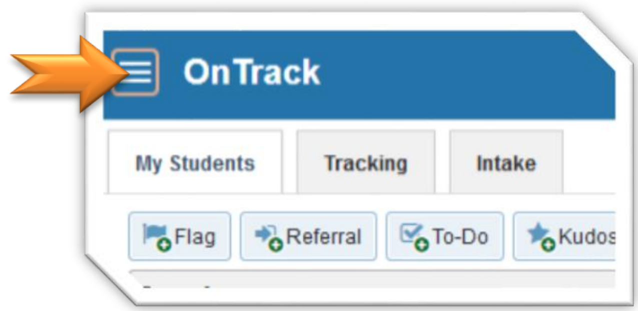


Figure 1 | OnTrack Log-in Page

1. **LOGIN TO OnTrack | Go to the:** [**OnTrack.pace.edu**](OnTrack.pace.edu)
   Login using your University username and password
2. Click on the **MENU BARS**
3. Select option on the left**.**
   (See BEST PRACTCES to set your default landing page.



Upon log in, you will see your default landing page of homepage. The default homepage shows your dashboard, which includes upcoming appointments, recent changes, and services to which you are connected.

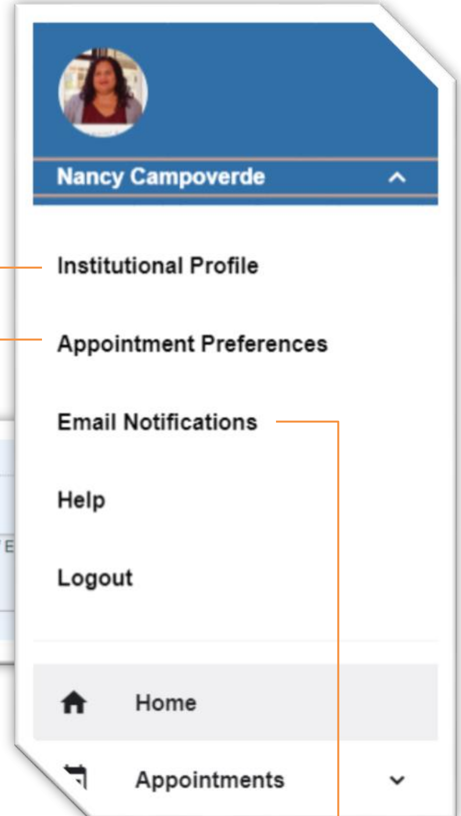
If you are in a role that connects to all students, you will see some information not relevant to you. You can close and rearrange tiles. The triple bar or "hamburger" icon opens additional **OnTrack** functions.

If you have additional questions, you can find information at http://www.pace.edu/OnTrack. The information page has FAQs, links to quick guides and training material.

You can also open a helpdesk ticket at https://help.pace.edu or call the Helpdesk 914.773.3333.

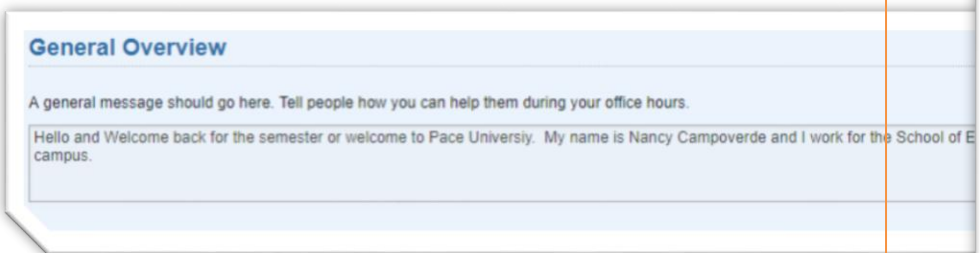
PROFILE INFORMATION

1. Click on the "hamburger" **MENU BARS**. *(Top left hand corner)*
2. Click **YOUR NAME** to expand your **OnTrack** profile options



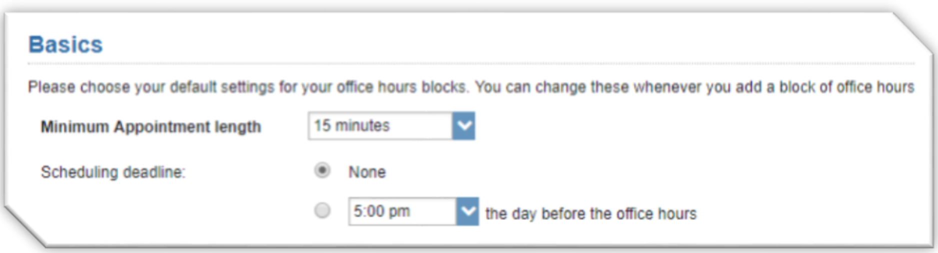
INSTITUTIONAL PROFILE:

Contact Information, **My Biography** and **General Overview** areas are visible to faculty, staff and students who have a connection to you through a University role. Please fill out as much as possible to help make **OnTrack** more inviting to our students.



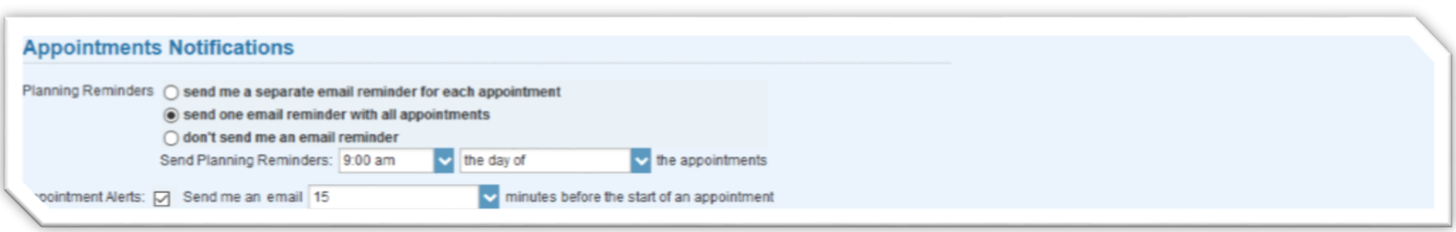
APPOINTMENT PREFERENCES:

Default Settings for the online scheduling tool, appointments and office locations. You can set minimum appointment length, create your locations and set scheduling deadlines restrictions allowing you to configure how far in advance students have to make their appointments.



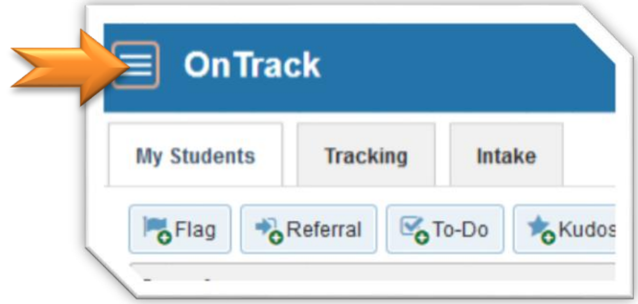
EMAIL NOTIFICATIONS:

Notification and Summary settings. Configure your personal online appointment notification settings including reminders and appointment alerts. Configure summary email and tracking item notifications settings



UPDATE YOUR PROFILE

Profile information updates each evening through direct Banner upload. This information can be supplemented with a photo, additional email addresses, and telephone numbers.



1. **LOGIN TO OnTrack | Go to the: OnTrack.pace.edu**
   Login using your University Username and Password
2. Click on the **MENU BARS**
3. Click **YOUR NAME**
4. Click **INSTITUTIONAL PROFILE**

NOTE: If the information that is pre-populated in your Profile is incorrect, you must request it to be corrected in Banner by opening a helpdesk ticket. http://help.pace.edu or calling 914.773.3333

Any changes made to pre-populated fields directly in your OnTrack profile will be overwritten nightly.

INSTITUTIONAL PROFILE

- You can update your photo by clicking the **UPLOAD PHOTO** link to add or change the photo default
- Review Contact Information and you can add additional contact information such as a secondary email address, if desired.
- Add content to the **GENERAL OVERVIEW** and **MY BIOGRAPHY** sections. This information can help students know if, how, and why they should reach out to you.

APPOINTMENT PREFERENCES

- **BASIC** appointment preferences, such as minimum appointment length and schedule deadline can be set for your default settings for office hours. You can change these default settings as you add new office hour blocks.
- Under **MY LOCATIONS** enter locations for your meetings with students. Meetings can be in an office, online, over the phone, or anywhere else.
- If you would like someone else to be able to add student appointments to your calendar, add a **CALENDAR MANAGER**. You can select any other **OnTrack** user.
- Click Submit to save your information.

EMAIL NOTIFICATIONS

- **APPOINTMENT NOTIFICATIONS** preferences allow you to set your calendar reminders, set specific alerts and connect to your Exchange calendar.
- Under **Summary Emails**, change or remove summary email of all tracking item and appointment activity
- **Tracking Item Notification** You can select to receive an immediate email when items are raised and/or cleared. You may be notified of tracking items raised for the following rules created by the administrator.

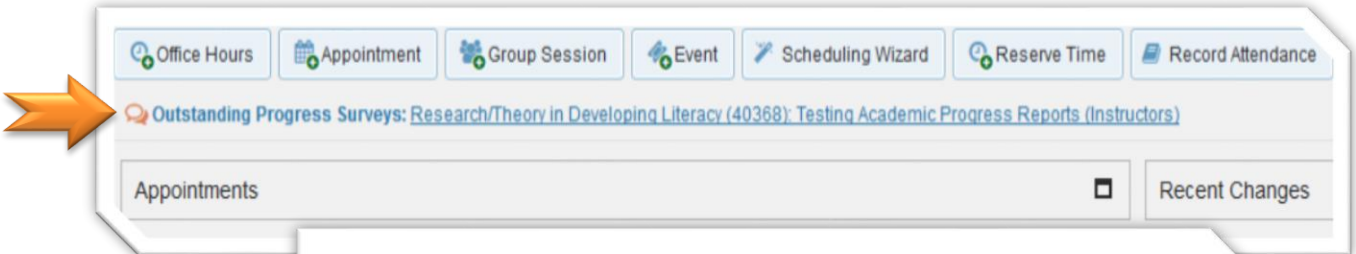
NOTE: rules with emergency notifications, your personal notification preferences will be overridden and you will always be notified immediately when a tracking item is raised for that rule.

ACADEMIC PROGESS REPORT (APRs)

Academic Progress Reports or **APRs** allows student success teams to request information at key points through the semester such as the first week of the semester to check attendance or prior to the drop/add or withdrawal deadlines. To give our students critical feedback they need to make informed decisions.

OPEN ACADEMIC PROGRESS REPORT OR (APRS) SHOW AS A HYPERLINK AT THE TOP OF THE HOME-LANDING PAGE.

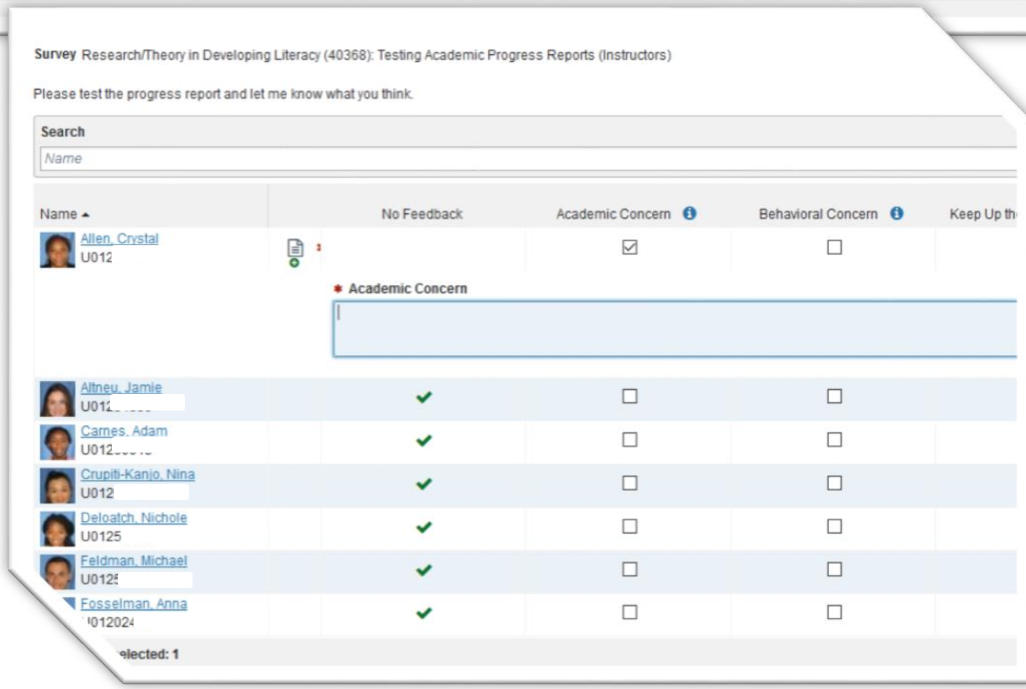
1. Select the **Outstanding Progress Report** link on the **OnTrack** Homepage.
   NOTE: Each course will have its own Academic Progress Report.



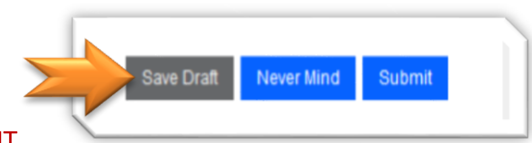
2. Check the boxes that apply for each desired item(s) you would like to report on, for any of your students.

3. Click the comments icon ( ) to add comments or notes.

   You can click the information icon to verify whether the student can view the flag.



IMPORTANT NOTE:
DO NOT SUBMIT UNTIL YOU ARE COMPLETELY FINISHED WITH THE REPORT!
USE **SAVE DRAFT** IF YOU ARE NOT READY TO SUBMIT YOUR REPORT. YOU CAN THEN RETURN LATER TO COMPLETE THE REMAINING REPORT AND SUBMIT.



4. Once you have **COMPLETED** the report, Click **Submit.**

RAISE A FLAG or KUDOS at ANYTIME

Advisors, Coaches, Faculty and others have the ability to raise flags and/or kudos at any point in the semester. This is beneficial to faculty, if there is concern for a student before an Academic Progress Report is available or after the Academic Progress Report has been submitted. **There are multiple ways to raise a flag, kudos, referral, etc… This Quick Guide takes you through the two main way to raise a tracking item.**

OPTION 1: THE STUDENT'S FOLDER (One at a time)

1. Click on the **Student's name.** That will open the "**STUDENT'S FOLDER.**"
   Student names are active links anywhere in OnTrack

2. Click on the desired tracking item button with the plus sign: *Flag, Referral, To-Do, Kudos…*

3. Click on the button of for the tracking item desired: *Flag, Kudos, Referral, To-Do, Message and Notes.*

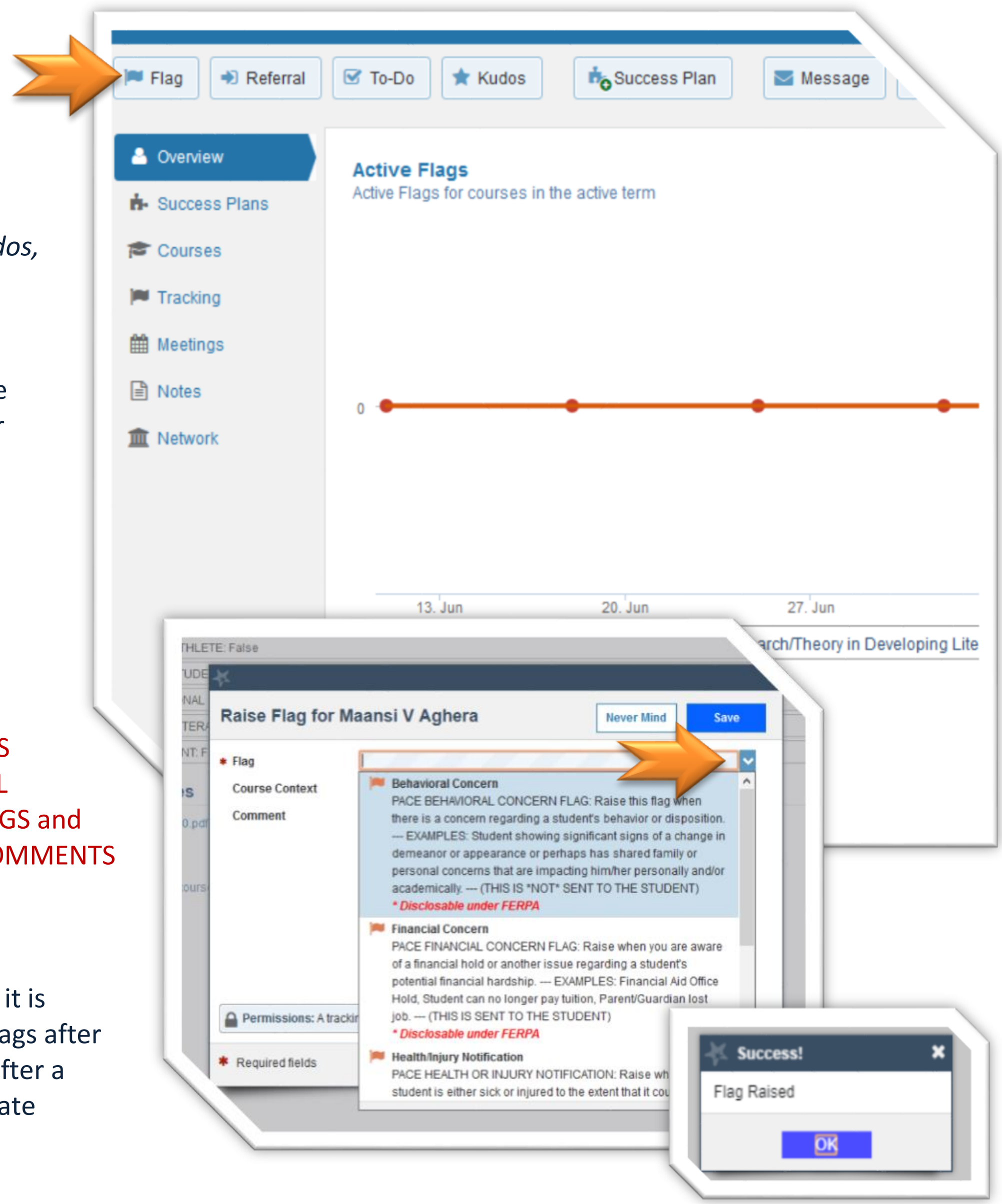
4. Select the *FLAG* or *KUDOS* in the pop-up window then enter your comments if needed**.**

5. Click **Submit.**

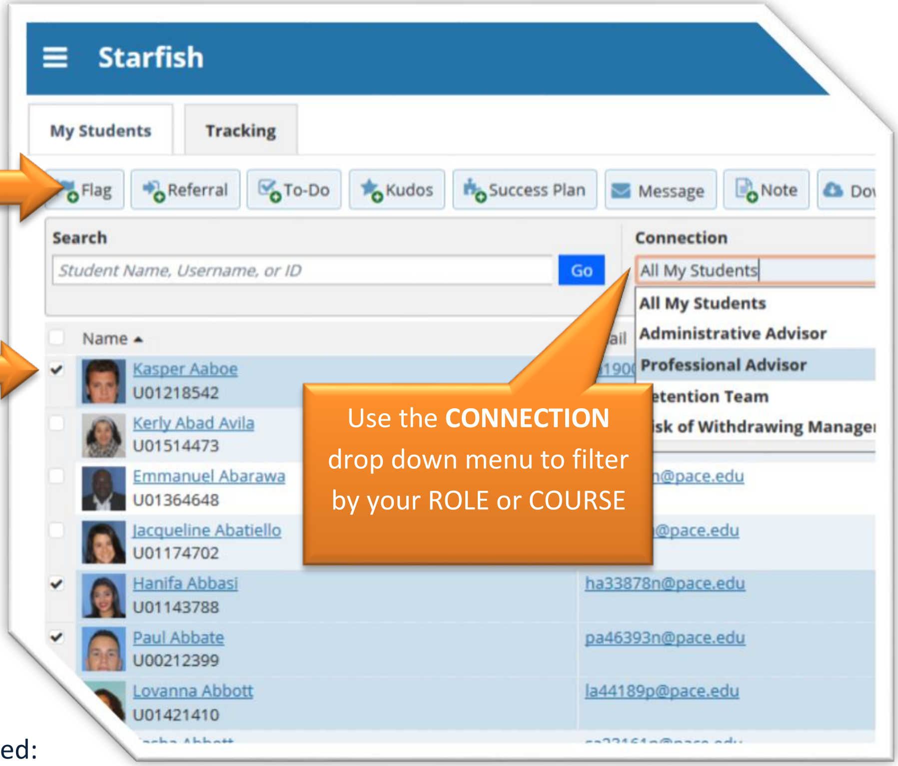
   Once you click **SUBMIT**, the Tracking Item, is added to the Student's account.

   IMPORTANT NOTE: AN EMAIL IS SENT TO THE STUDENT, FOR ALL ACADEMIC & ATTENDANCE FLAGS and ALL KUDOS, INCLUDING ANY COMMENTS YOU TYPE **YOU ENTER.**

   As part of our **BEST PRACTICES,** it is helpful to update or clear any flags after the issues has been resolve or after a week of inactivity days and update accordingly.



OPTION 2: MY STUDENTS SCREEN (One or Multiple Students)

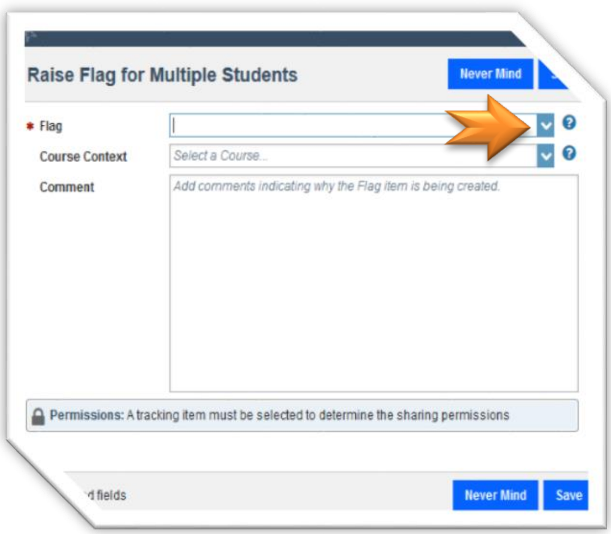


1. From the **MY STUDENTS** screen Check the box next to the student(s)' photo.

   This allows you to select multiple students so that you can open the same ITEM for all the selected students, including comments.

   IMPORTANT NOTE: AN EMAIL IS SENT EACH STUDENT INDIVIDUALLY FOR ALL ACADEMIC & ATTENDANCE FLAGS AND ALL KUDOS AS WELL AS COMMENTS YOU ENTER.

2. Click a button at the top of the page for the tracking item desired: *Flag, Kudo, Referral, To-Do, Message and Notes.*



3. Select the *FLAG* or *KUDOS* in the pop-up window then enter your COMMENTS.

4. Click **Submit.**

.

   NOTE: Once you click submit, the Tracking Item, is added to the Student's account.

   As part of our BEST PRACTICES, it is helpful to update or clear any flags after the issues has been resolve or after a week of inactivity and please comment accordingly.

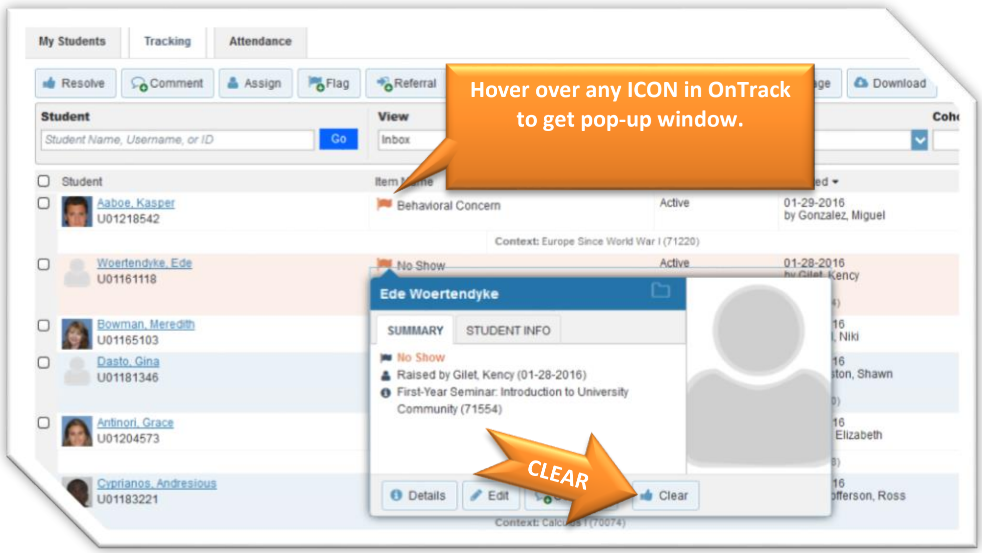
CLEARING A FLAG FOR A STUDENT

One of the most important aspects of **OnTrack** is the ability to identify students at risk. With this ability comes a need to "close the loop" or to clear the open flags in **OnTrack.**

1. Select the **STUDENTS** then the **TRACKING** sub-tab

   You will see a list of your students and the tracking items raised for your students.

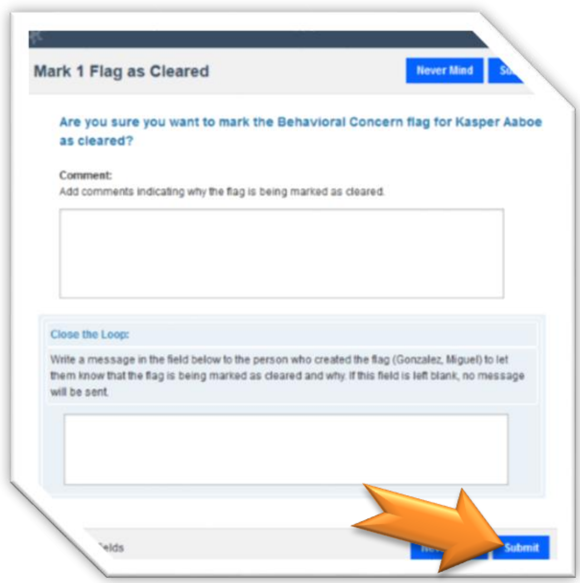
   Identify which flag you want to clear.



2. Hover over or click the **FLAG ICON** then select **CLEAR**.

3. Enter a **COMMENT** as to why you are clearing the flag. This is beneficial for record keeping and for other faculty and staff connected to the Student.

4. Then Click **Submit**. The flag will no longer appear as active.



To review flags that you have cleared, simply return to the Tracking sub-tab and sort for **"ACTIVE AND RESOLVED"** items in the View sorting bar.

NOTE: with multiple Instructors, Success Advisors, and service providers having the ability to assist the students. Some flags will remain active longer than others. This does not mean the student has not received assistance. To help in the process you should always note if you are working on an issue and try to clear any resolved items.

IMPORTANT NOTE: ALL FLAGS ARE AUTOMATICALLY CLEARED AT THE END OF EACH SEMESTER.

CLEARING FLAGS FOR MULTIPLE STUDENTSNTS

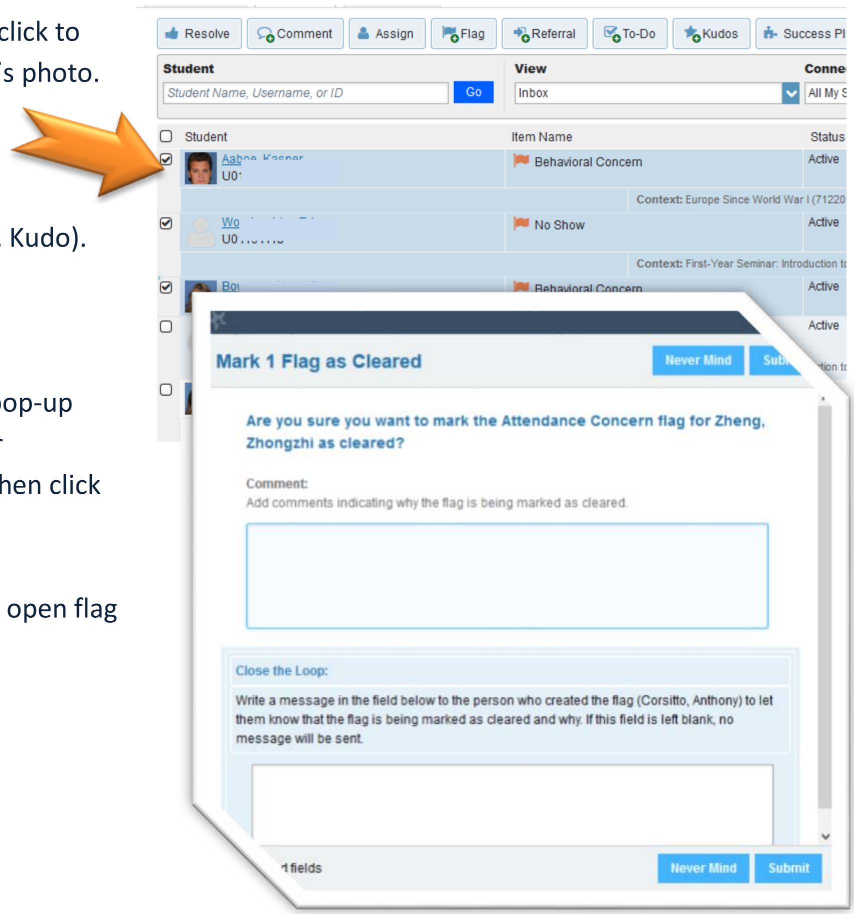
1. Select the **STUDENTS** tab at the top of the page.
   (See **BEST PRACTCES** document to set this as your default page)

2. Click on the **TRACKING** tab on the second row of navigation tabs.

3. On the **TRACKING** tab you will get a listing of students that have flags raised.
   This is a listing of all of the students you have permissions to view based off your role or connection in **OnTrack**.

4. Once you are on the **TRACKING** screen click to check the box to the left of the student's photo.

   You have a few different options above the students' name (Resolve, Comment, Assign, Flag, Referral, To-Do, Kudo).



5. Select **RESOLVE** to clear the Flag(s).

6. Once you click **RESOLVE** you will get a pop-up window. In this window you enter your comments in the appropriate box and then click **SUBMIT.**

   You have now successfully cleared your open flag or closed the Loop.

ONLINE APPOINTMENT SCHEDULING

OnTrack also allows online appointment scheduling. The following three conditions must be met, in order for students to schedule an appointment with you;

1. You must have a connection to the student(s) through at least one of your **OnTrack** roles.
2. You must be visible to the student through a one-to-one connection (assigned Success Adviser, Instructor) or listed as a member of a public-facing service (Writing Center, Library, etc…).
3. You must make appointments times available to your students using one of the options detailed below.

Once you enable your online scheduling availability, students with a connection to you can see your open appointment times, and select the appointment that fits their schedule. Students can see times that are available, times that are busy, and times that are scheduled by other students. The Students can not see any details of those other meetings.
NOTE: Students can only see upcoming availability for the next 90 days, nothing beyond so even if you have created availability further in the future they will not be able to see those times right away.

ADDING Online Scheduling Availability

There are two ways you can add availability:

1. The Add **Office Hours** button to add recurring blocks of availability
2. The **Scheduling Wizard** to setup multiple office hour blocks that don't follow a consistent recurrence.

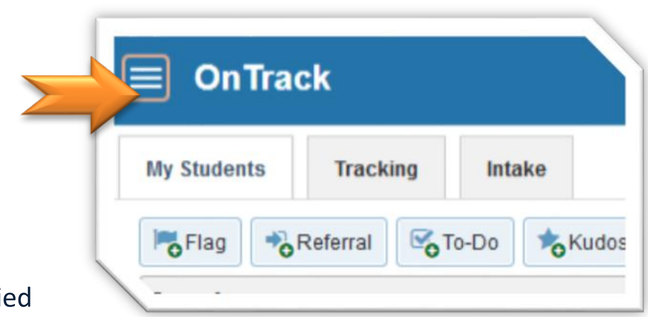
SCHEDULING WIZARD

IDEAL FOR ADDING NON-RECURRING BLOCKS OF APPOINTMENTS

This option is ideal for users who have calendars that change often and where appointment availability needs to fit around other calendar items in an non-patterned way. This method allows you to create multiple, separate blocks of availability, and easily cancel or modify only specific blocks if needed.

NOTE: This method will only allow you to set up availability for scheduled meetings. Use the Add Office Hours button (see instructions in the next section below) to create Walk-in availability.

1. **LOGIN TO OnTrack | Go to the: OnTrack.pace.edu**
   Login using your University Username and Password



2. Click the **Scheduling Wizard** button from your **OnTrack Home page** or **Appointments page**.

3. **Enter** the Title, location (Where?), duration (How long?), Appointment Types and Instructions that should be applied to all of the office hour blocks that are to be created.

4. Click the **NEXT** button

NOTE: The date and time page of the wizard is displayed using a Monday through Friday grid for the current week. The date range is displayed in the top right corner of the grid.

5. Use the < > controls to the right of the date range to **navigate to the week in which you want to begin scheduling** the office hours.

6. In the selected week, **enter the start and end times for each block** in the appropriate day columns. You can schedule multiple office hour blocks on any day within the week.

   NOTE: If you need to schedule more than three blocks on any day, select the "Add Another Block" link in the column for that day.

7. To add blocks to another week, use the < > controls to move to the next week and repeat until you have entered all of the blocks you wish to add at this time.

8. Click the **FINISH** button to create all of the office hour blocks.

   NOTE: A summary is presented that includes a list of hours that could not be created due to conflicts between the blocks you specified and existing calendar items. Make a note of failed blocks before clicking Finish to exit the wizard.

If you set email preferences to receive iCal Calendar attachments for changes to your appointments, you will receive an email for each block of time that can be accepted to your external calendar.

OFFICE HOURS BUTTON

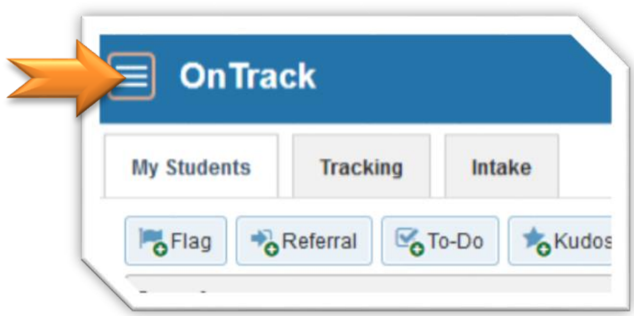
If you allow scheduled appointments, students can schedule their own appointments online from the times you make available. You can control whether or not these hours are by walk-in or scheduled appointment.

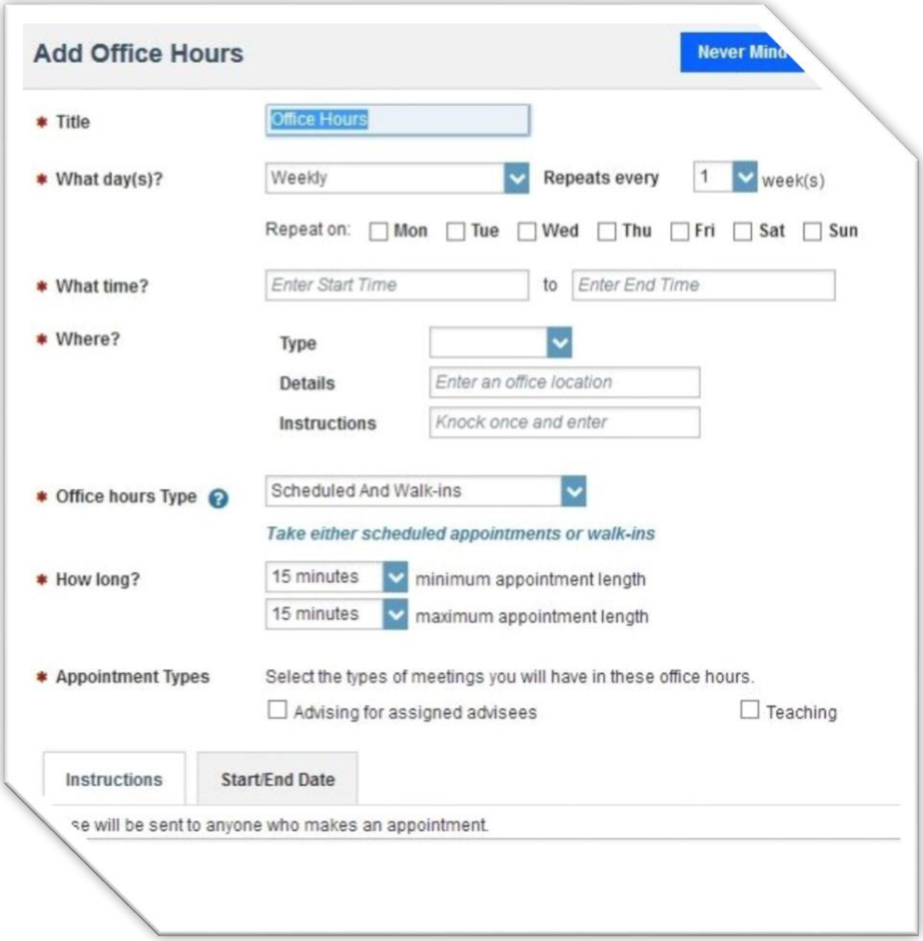
1. **LOGIN TO OnTrack | Go to the: OnTrack.pace.edu**
   Login using your University username and password

2. Click on the **MENU BARS**

3. Click **APPOINTMENTS**

4. Click the **OFFICE HOURS** button to open the **Add Office Hours** dialog box.





5. Select the **days** with office hours.

6. Select the **Start and End times** for your office hours.

7. Select **Where** you will hold office hours and any special instructions for that location.

NOTE: If you need to add additional locations, go to the Appointment Preferences tab on your Profile.

8. Select the **Type(s)** of meetings you are making available, e.g., walk-in or by scheduled appointment.

NOTE: Choosing scheduled appointment allows students to select one of the available times online and schedule a meeting with you.

9. If allowing scheduled appointments, select **how long** appointments will be.

10. Choose which **appointment types** you will use during these hours.

For example: if you are willing to see both assigned advisees and students in your courses during these hours, select both Teaching and Advising for assigned advisees appointment types.

11. Enter instructions, e.g., "check in at the main office" or “My Office is on the 3rd floor, the last door on the left”

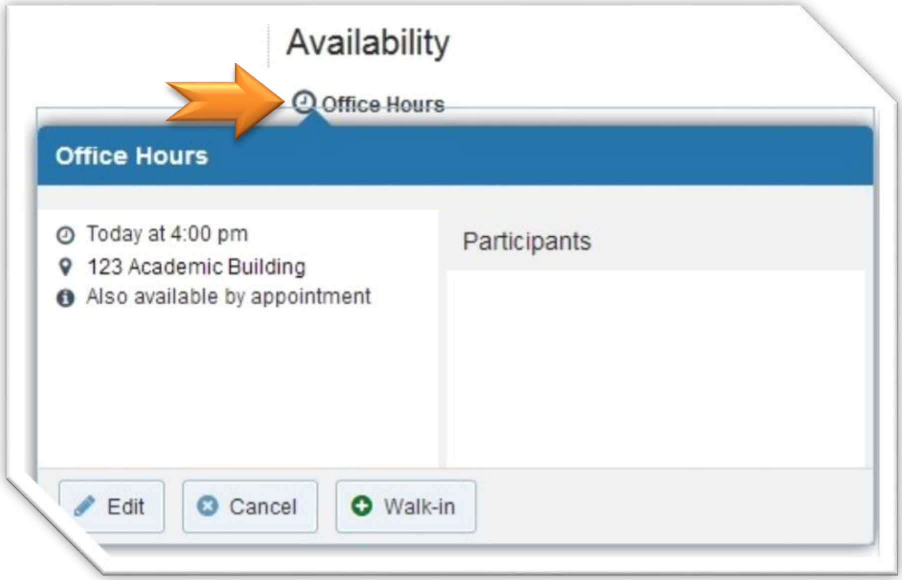
12. Set a **Start and End Date** for these hours. **NOTE:** If you do not set an end date, this block will be set **forever.**

13. Click the **SUBMIT** button.

EDITING OFFICE HOURS

Once created, Office Hour blocks can be edited. Changes will take effect for all past and future Office Hours in the block.

1. Click the **Appointment** tab.
2. Go to the **Agenda view**.
3. Hover over the **Clock icon** next to your Office Hours.
4. Select **Edit** to modify the frequency of the office hour block's recurrence, the time of day, locations, office hour types, minimum and maximum duration of appointments, appointment types, instructions, or a start/end date of the series.



NOTE: You cannot edit the days of the week or the nature of the recurrence (e.g. weekly). You cannot modify the time range for a single occurrence of an office hour within a recurring block. Selecting Edit Office Hours will modify all occurrences of this set of office hours. To reduce availability within an office hour block on a specific day, add reserved time to cover the part of the office hours you want to remove from availability.

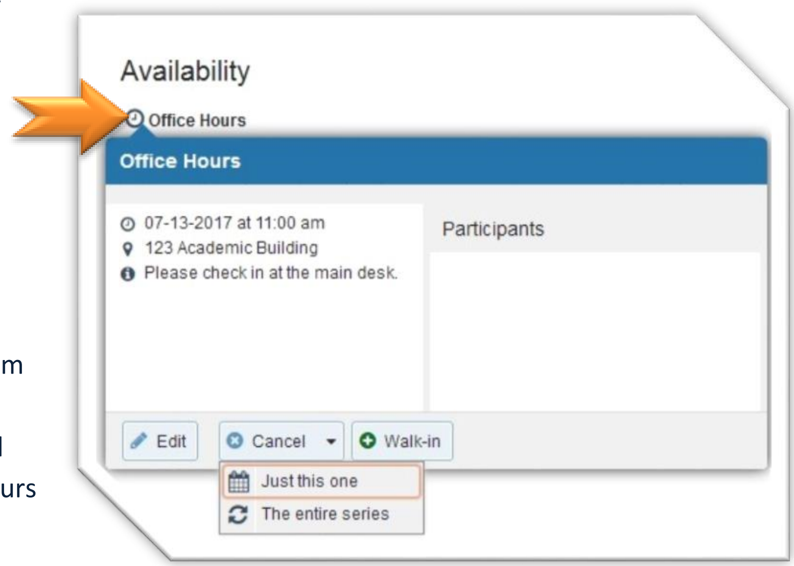
5. Click **SUBMIT**

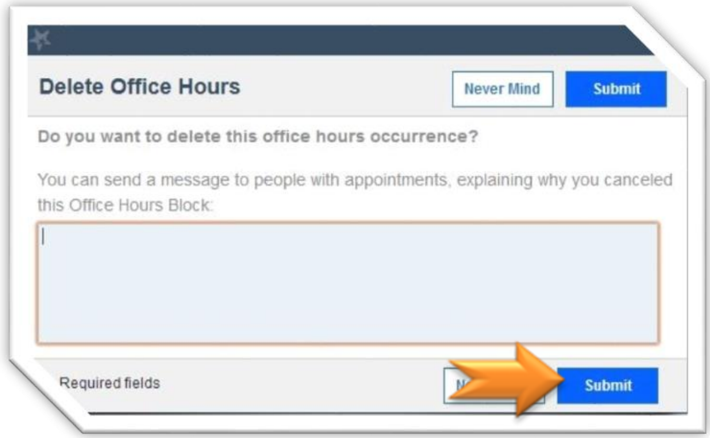
CANCELING OFFICE HOURS

1. Hover over the **Clock icon** next to your Office Hours.
2. Click the **Cancel** button.

   IMPORTANT NOTE: When you cancel Office Hours, any scheduled appointments during that block of time will also be cancelled.

3. You will be prompted to confirm the date from which to cancel the series, and to add a message that will be sent to anyone who had time scheduled with you during the office hours you are canceling.





BEST PRACTICE: include an explanation and provide guidance on how to reschedule or connect to other available resources.

NOTE: If you are on the current day, clicking Cancel will cancel this instance only. If you are on a future day, the Cancel button provides two options: Cancel Just this one or Cancel the entire series. Choose one of these options to proceed.

Students who had scheduled appointments during that block will receive a cancellation notice. You may add your own note to this cancellation notice in the comment box, if desired.

4. Click the **Submit** button.

CANCEL A SINGLE OCCURRENCE OF AN OFFICE HOUR BLOCK

1. Use the calendar to navigate to the desired date.
2. Select the **Day** view of your **OnTrack** calendar.
3. Hover over the office hours icon () next to an office hour title to open the Office Hours pop up card.
4. Click **Cancel**, then click “Just this one” to cancel office hours for the selected day only.

NOTE: If students have scheduled appointments during this block, those appointments will be canceled and students will receive an updated iCal calendar attachment in their Pace University email account.

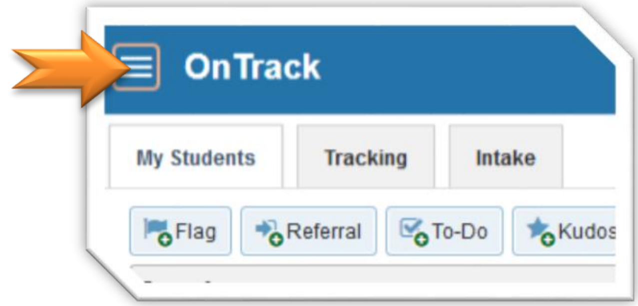
5. You will be prompted to confirm the cancellation and can add a note that will be included in an email to those whose appointments are canceled.

Best Practice: include an explanation and provide guidance on how to reschedule or connect to other available resources.

6. Click the **Submit** button to cancel the Office Hour occurrence.

EMAIL AND CALENDAR PREFERENCES

You can control your email and calendar preferences in **OnTrack** through your profile settings. These settings allow you to control the amount of email sent to you by the system and the configuration of your **OnTrack** calendar to sync with Exchange.



1. **LOGIN TO OnTrack | Go to the: OnTrack.pace.edu**
   Login using your University username and password
2. Click on the **MENU BARS**
3. Then click on **YOUR NAME**

UPDATE YOUR APPOINTMENT PREFERENCES

Use these settings to create meeting location(s) and to set appointment scheduling deadlines.

1. Click the **Appointment Preferences** tab

2. In the **Basics** Section, **select** your default settings for appointment ("office hours") blocks.

3. If you want to set a scheduling deadline for students, choose that here.

NOTE: This does not prevent a student from cancelling the scheduled meeting at any point.

4. Under **My Locations**, click **Add Location** and add the office address to be used by students when coming to meet with you.

5. Under **Calendar Managers**, add another **OnTrack** user who can add and edit **OnTrack** appointments for you, if desired

NOTE: Calendar Managers must be users of OnTrack, and can be in any role.

6. Click **Submit**

CONNECT ONTRACK TO EXTERNAL CALENDAR

1. Click the **Email Notifications** tab

2. If you would like **OnTrack** appointments to be visible on your external calendar, **check the boxes** by “Change to my appointments” and “change to my Office Hours/Group Sessions” under **Appointments Notifications**. When these boxes are checked, you will be emailed an .ical file with meeting details when any changes are made (e.g., times changed; student schedules a time slot). You can accept this to your external calendar, if you choose.

NOTE: If you decline the invitation to your calendar, OnTrack sometimes reads that decline as a cancellation notice. Be cautious, especially when declining calendar invitations on your phone.

3. If you would like your external calendar to be visible in **OnTrack**, and therefore “cover up” availability of meetings, **check the box** for “Read busy times from my external calendar."

4. Under Summary Emails and Tracking Item Notifications, **select** how often you wish to be emailed by **OnTrack** with information about your appointments and tracking items

5. Click **Submit**