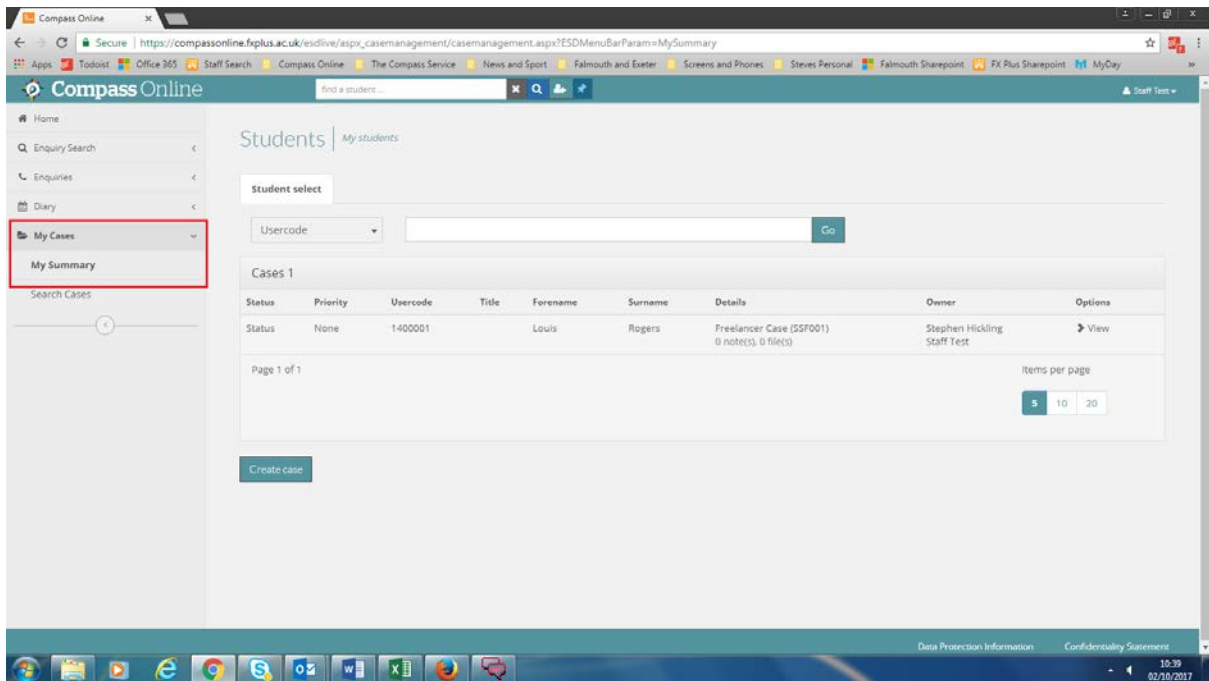


How to: Initiate a message to a student using Compass Online

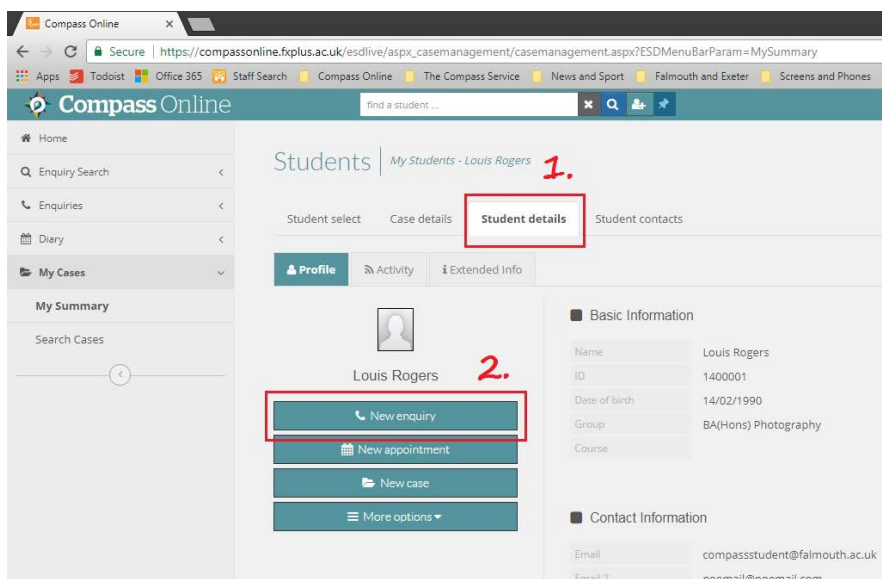
Overview:

This guide demonstrates how you should send an enquiry (message) to your student using Compass Online. By using the Compass Online system to do this it ensures the message is recorded.

1. Login in to Compass Online at <https://compassonline.fxplus.ac.uk>. This will take you to your profile page. **Please note:** If you experiencing problems logging in to the system please contact servicedesk@fxplus.ac.uk or call 01326 213822.
2. Click on **My Summary** from the **My Cases** option in the left-hand navigation menu – this will bring up a list of your available cases.

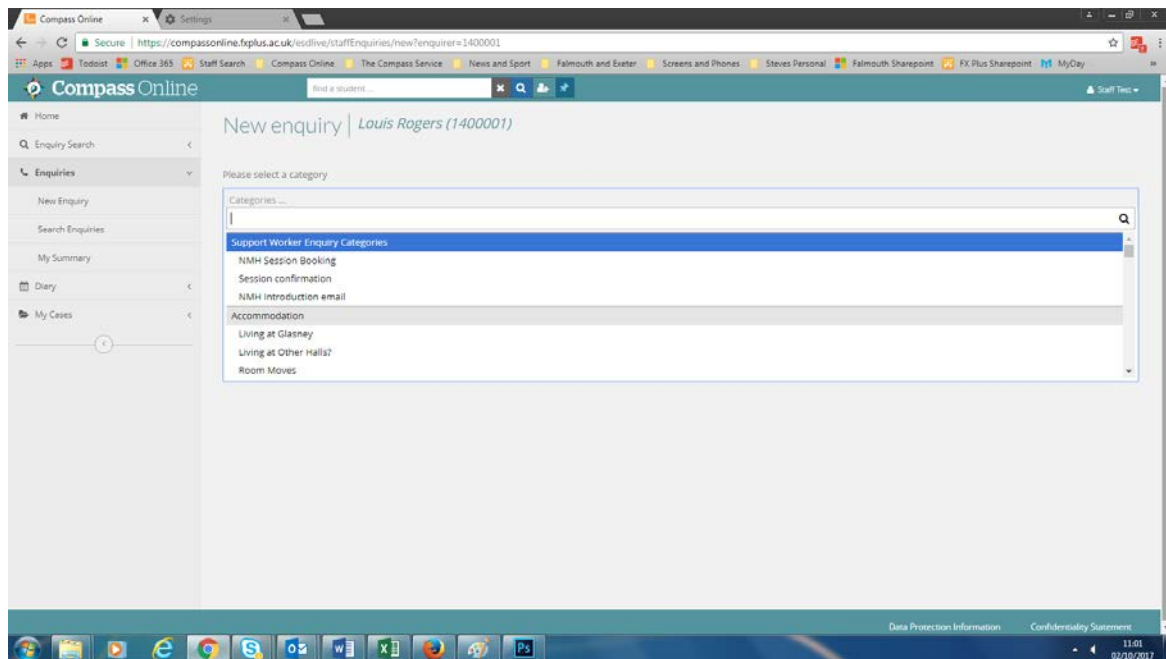


3. Click **view** to choose the case of the student that the message relates to. When you have opened the case click on **1. Student details** to view their profile screen. Select **2. New Enquiry** to send the student a message.



How to: Initiate a message to a student using Compass Online

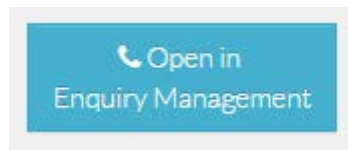
- You will be presented with a screen to 'set up' the message. Firstly you are required to enter an appropriate category. Select 'NMH Session Booking', 'NMH Session Confirmation' or 'NMH Introduction email' depending on what the message relates to.



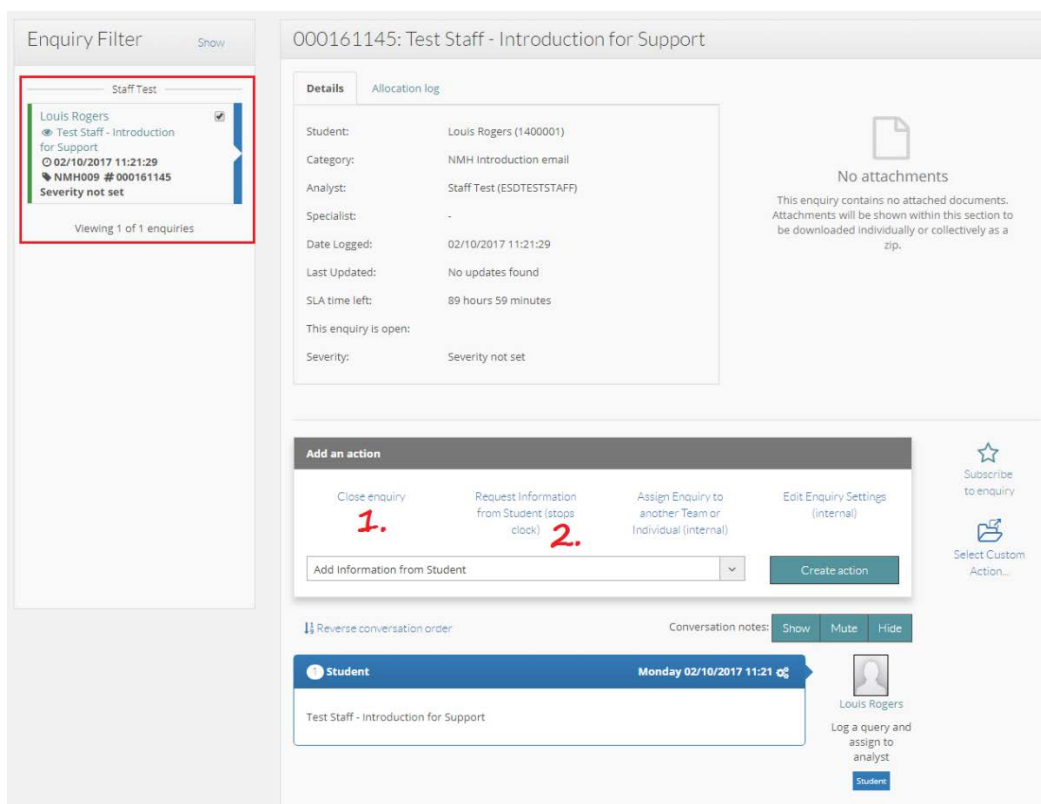
- After selecting the category, (1.) you will need to add a subject line (2.) – this is the subject line of the email received sent to the student. Copy the subject line in to the description box (3.) of the message – this is a mandatory field so you have to add some text to this box. Open up the **advanced options** tab and select 'allocate to self' (4.) – this ensures that any replies from the student come to you rather than the Accessibility Team. As you are setting up the enquiry at this stage you must deselect the 'send copy to student/ staff member' tick boxes (5.) Click 'Log Now' (6.)

How to: Initiate a message to a student using Compass Online

- Click on the Open in Enquiry Management button to show the message in your summary screen.



- This will open your enquiry (message) to enable you to send information to the student. Your enquiry (message) is listed on the left side of the screen. The message is displayed in the viewing pane to the right. To contact the student you need to **add an action** – many actions can be added to an enquiry. As a Non-Medical Helper, you will only ever need to use **Close Enquiry (1.)** or **Request Information from Student (2.)**
Use **Close enquiry** when you do not expect a response from the student (this 'closes' the enquiry).
Use **Request Information from Student** when you are expecting a response from the student.



The screenshot displays the Compass Online interface for an enquiry. On the left, an 'Enquiry Filter' sidebar shows a list of enquiries under the heading 'Staff Test'. The selected enquiry is 'Test Staff - Introduction for Support' by Louis Rogers, dated 02/10/2017 11:21:29, with ID NMH009 # 000161145 and severity 'not set'. The main area shows details for enquiry 000161145: Test Staff - Introduction for Support. The details include Student: Louis Rogers (1400001), Category: NMH Introduction email, Analyst: Staff Test (ESDTESTSTAFF), Date Logged: 02/10/2017 11:21:29, Last Updated: No updates found, SLA time left: 89 hours 59 minutes, and Severity: Severity not set. Below the details is an 'Add an action' section with buttons for 'Close enquiry (1.)', 'Request Information from Student (2.)', 'Assign Enquiry to another Team or Individual (internal)', and 'Edit Enquiry Settings (internal)'. A dropdown menu is open showing 'Add Information from Student'. At the bottom, a conversation note is visible from the student: 'Test Staff - Introduction for Support' on Monday 02/10/2017 11:21.

- Click on the appropriate action for this message as detailed above. This will open a pop-up box (please note – this box is consistent depending on which action you select). You can select from the list using the down arrow or use the shortcuts above. Select **Create Action** to display the pop-up box.
- Under the **Action message** tab, type the message you want to send to the student. Please note: there are templates pre-set to help you – click on the 'Team' button to display available templates – there are currently templates for **NMH Introduction** message and **Session Confirmation**. Selecting either of these templates will populate the description box with the content. You can edit the content to tailor your message.

How to: Initiate a message to a student using Compass Online

Close enquiry

Action message | Action settings | File Upload | Email options

Description:

Dear XXXX,
My name is XXXXX and I have been allocated as your XXXX. Please let me know your availability and we can arrange our first session together.
You can contact me by replying to this message, emailing XXXXX or calling/texting XXXXXX.
Looking forward to hearing from you soon.
XXXXX

Category 0 | Staff member 0 | Team 2 | Enquiry centre 0

Cancel | Save as draft | Send action

10. It is important to check the other tabs before sending the message. You are unlikely to need to use the **Action settings** tab, however you may need to use **File Upload** and **Email Options**.
11. Click on File Upload to add any attachments to your message. You can drag and drop or upload from the hard drive of your computer.
12. **Email Options** determines where the message is being sent to – it is worthwhile checking this tab before you send every message.
 - **Email student** should be ticked as default – this will send a message to the student's university email address.
 - **Email file attachments with update** must be ticked to send any file upload attachment with the email to the student.
 - **Adhoc Emails** – You can add the student's personal email address to this box to ensure they receive a copy to an email address other than their university inbox.

Close enquiry

Action message | Action settings | File Upload | Email options

Include full enquiry text in email | Hide email link to enquiry

Email student | Email self | Email owner

Email file attachments with update

Adhoc Emails:
(use a semi-colon or comma to separate multiple addresses)

Cancel | Save as draft | Send action

13. Click **Send action**.

How to: Initiate a message to a student using Compass Online

14. All messages that you have completed will appear in your summary grid. Click on **Enquiries** in the left-hand navigation menu then **My Summary**.

- You may need to **Show Summary Grid (1.)** to view your live snapshot of enquiries (messages).
- When you have closed an enquiry, (ie. selected the Close Action as you not expecting a response from the student) it will list it in the **Closed** column (2.)
- If you selected the action 'Request Information from Student', it will put the enquiry in the **With Student** column until the student has responded (3.)
- When the student responds to your message, you will receive an email notification prompting you to log in to Compass Online to view the enquiry. If the student responded to an enquiry where you have requested information (expected a response) it will put it in the **With Staff Member** column (4.) If the student responds to a closed enquiry, it will reopen it and place it in the **Re-Opened** column (5.)

Staff Member	Open	With Specialist	Waiting 1st Response	Re-Opened	On Amber	On Red	Out of Contract	With Student	With Staff Member	Closed
Staff Test	1			5				1	1	1
Totals	1							1	1	1

15. If a student responds to a message, you will receive an email notification to prompt you to log in to the system to contact the student. Simply complete instructions 7 – 13 to contact the student.

Please note: closed enquiries will only remain on the grid for approximately 24 hours – you can view historical enquiries relating to a student by clicking the activity tab in their profile screen. You can view this screen by selecting the **Student details** within their case (see instruction 3) or by using the student finder at the top of the screen.

Type	Description	Owner	Created	Updated
000161197	Confirmation	Staff Test	02/10/2017 12:02:10	02/10/2017 12:02:24