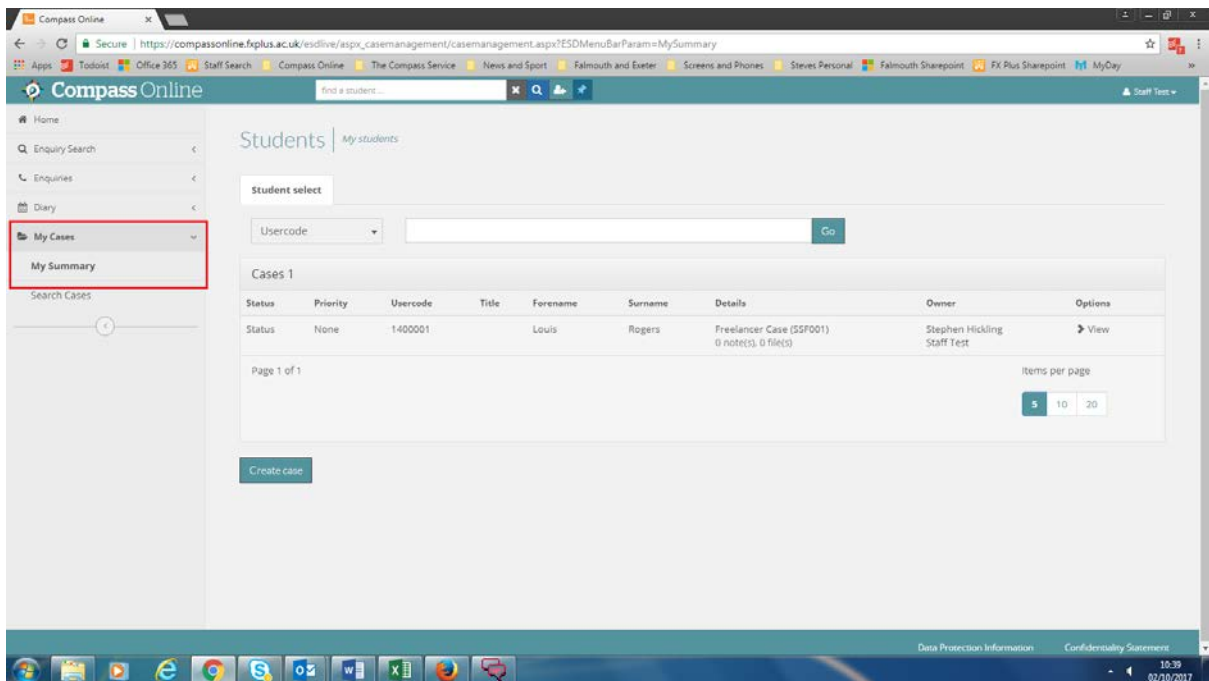


How to: Respond to a message to a student using Compass Online

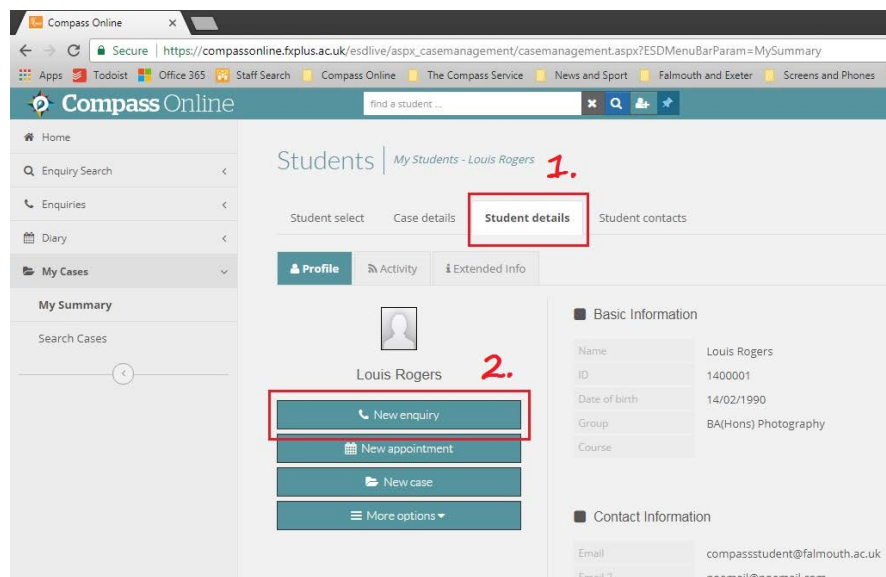
Overview:

This guide demonstrates how you should respond to an email that a student has sent to your personal email account using Compass Online. Using the Compass Online system to do this it ensures the message is recorded against the student's activity.

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.

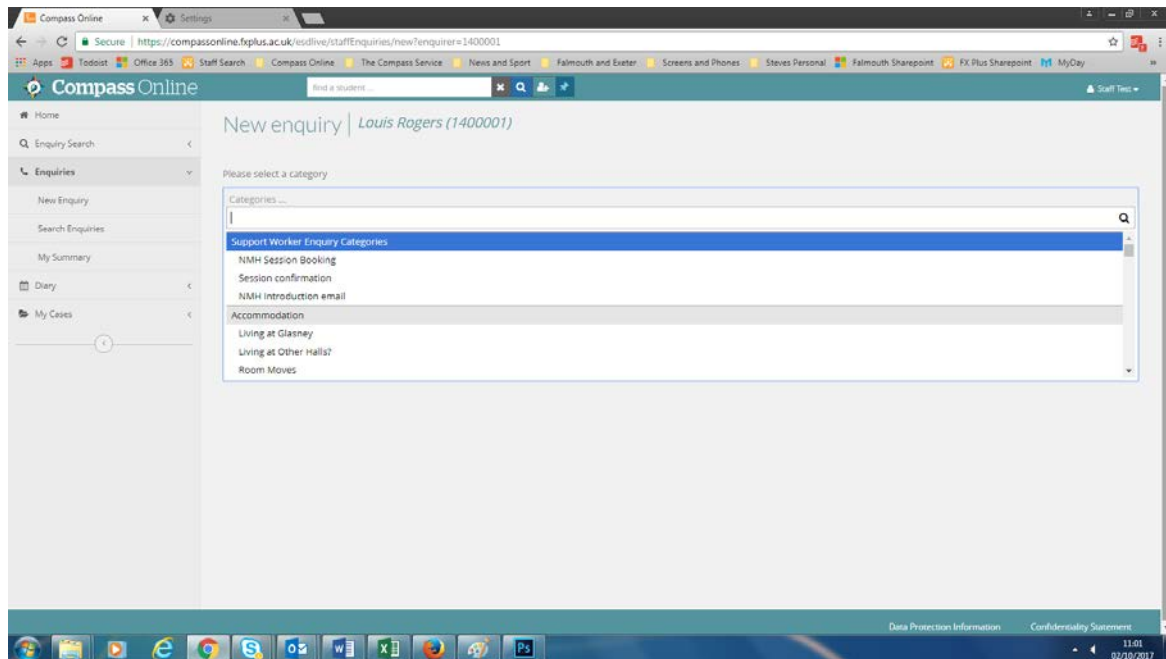


3. Click **view** to choose the case of the student that the message relates to. When you have opened the case, click on **1. Student details** to view their profile screen. Select **2. New Enquiry** to send the student a message.



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4. 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', 'Session Confirmation' or 'NMH Introduction email' depending on what the message relates to.



5. After selecting the category, (1.) you will need to add a subject (2.) – this is the subject line of the email that the student will receive. Copy the email content from your personal email in to the description box (3.) of the message. 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 the enquiry is only being set up at this stage, you should deselect the 'send copy to student/ staff member' tick boxes (5.) Click 'Log Now' (6.)

New enquiry | Hannah Banner (1400000)

Please select a category
NMH Session Booking 1.

Subject
Test Staff Member - meeting for support 2.

Message
Description Solution

Hi Test Staff Member.
I hope you had a good summer?
I could meet next week if that's good for you?
If you could let me know that would be great!
Thanks:
Hannah

3. Copied from the student's email to your personal email account

Responses
Category 0 Staff member 1 Team 2 Enquiry centre 0

Show advanced options

Type: Select a Type Source: Select a Source Cause: Select a Cause

Enquiry allocation
Allocate to self ✓ System allocation Manual Allocation

Close on logging 4. Parent enquiry: Parent enquiry number

Drop Files Here

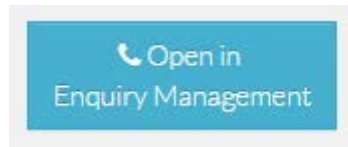
Private enquiry Hidden enquiry ?

5. Send copy to student Send copy to staff member

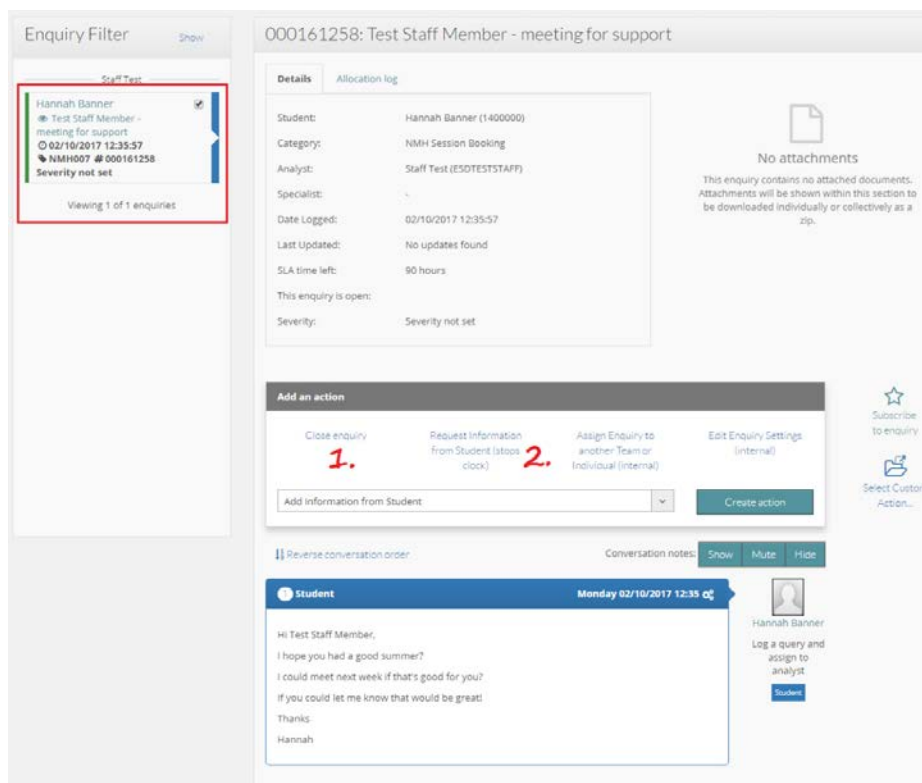
6. Preview Cancel Log now

How to: Respond to 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 should 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' shows a list of enquiries, with one selected: 'Hannah Banner - Test Staff Member - meeting for support'. The main area shows details for this enquiry, including the student's name (Hannah Banner), category (NMH Session Booking), and analyst (Staff Test). Below the details is an 'Add an action' section with four options: 'Close enquiry' (marked with a red '1.'), 'Request Information from Student (stops clock)' (marked with a red '2.'), 'Assign Enquiry to another Team or Individual (internal)', and 'Edit Enquiry Settings (internal)'. A dropdown menu is set to 'Add information from Student', and a 'Create action' button is visible. At the bottom, a conversation history pane shows a message from the student: 'Hi Test Staff Member, I hope you had a good summer? I could meet next week if that's good for you? If you could let me know that would be great! Thanks, Hannah'.

- 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. Everything that is displayed in this box will be sent in the email to the student.

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Close enquiry

Action message | Action settings | File Upload | Email options

Description:

B **I** **U** [List Icons] [Text Color] [Image] [Link] [Table] [Help] [Code]

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.
XXXX

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: Respond to 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 3.	1 4.	1 2.
Totals	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