



Success Plans

Overview

Success Plans help advisees stay focused, organized, and on track to achieve a goal or milestone. They provide a clearly defined set of activities (Tasks) to help advisees do things like complete their first-semester onboarding, apply to a study abroad program, or get off academic probation—and help advisors keep an eye on advisees progress.

1. Navigate to the Case Advisee Record.
2. Select Success Plans.

Case Sally Advisee Tester Advisee Record

Appts Notes Programs **Success Plans** More

Open Success Plans (12) [Apply Success Plan](#)

Plan Name	Record Type	Open Tasks	Overdue Tasks
First 60 days	Academic	1	0
Graduation	Academic	2	0
Graduation	Academic	2	0
Adding a Minor	Academic	5	0
Tester	Academic	0	0
Adding a Minor	Academic	5	0
Exploring/Changing...	Academic	8	0
Academic Success ...	Career	7	2
Study Abroad	Academic	8	0
Test	Academic	0	0

[View All](#)

Closed Success Plans (4)

Plan Name	Record Type	Open Tasks	Overdue Tasks
Graduation	Academic	0	0
Adding a Minor	Academic	0	0
Career R2D2	Career	0	0
First 60 days	Academic	0	0

3. Lookup a contact.
 - The system will auto-populate the student whose case record you are in.



4. Apply to a single contact or multiple.

Apply or Create a Success Plan

Select Advisee

* Apply To

Search Advisees

Sally Middle Name Tester X

Choose a Starting Point

- Apply an existing Success Plan Template**
Select a Success Plan Template and customize it for your advisee.
- Create a new Success Plan from scratch
Build out a new Success Plan for your advisee.

5. Choose the checkboxes of the Success Plans you are assigning to the contact(s).

Select a Success Plan Template

Browse the available Success Plan Templates and select one to apply to your advisee.

Q Search Success Plans...



Success Plan Templ... ▾	Record Type ▾	Utilizations ▾	Active Tasks ▾	Owner ▾
<input type="checkbox"/> Adding a Minor	Academic	8	5	Cory Landers
<input type="checkbox"/> First 60 days	Academic	7	1	Cory Landers
<input type="checkbox"/> Graduation	Academic	4	1	Cory Landers
<input type="checkbox"/> Study Abroad	Academic	3	9	Cory Landers
<input type="checkbox"/> Exploring/Changing You...	Academic	2	8	Cory Landers
<input type="checkbox"/> Career R2D2	Career	2	2	Adam Advisor
<input type="checkbox"/> Program Onboarding	Academic	1	5	Cory Landers
<input type="checkbox"/> Academic Success Plan	Academic	1	8	Cory Landers
<input type="checkbox"/> Testing	Academic	0	1	Cory Landers
<input type="checkbox"/> Readmission and Acade...	Career	0	2	Cory Landers