

Civitas Inspire Guide

Version July 20, 2022

Created by Sapna Naik, Ph.D.

Assessment Analyst, Student Success

Table of Contents

Notes about this guide and training	2
Introduction to Civitas Inspire.....	2
Accessing Civitas Inspire	3
Syncing with Outlook	4
Setting up your availability.....	5
Looking up student information	6
Scheduling appointments.....	7
Editing and canceling appointments.....	9
Adding appointment notes.....	11
Seeing all notes for a student and all of your notes.....	13
Creating student groups	14
Dynamic Groups	15
Static Groups.....	16
Creating reports.....	17
Acting on data (an introduction).....	18
Messaging students.....	19
Inspire Roles.....	20
Student Success Units	20

Notes about this guide and training

- This training and packet are from a practitioner's perspective. The interface I am sharing with you in this training and packet are for SSU 4, Academic Success Programs, and for my level of access as an "Advisor." Your interface and options may look different based on your unit and level of access. I am not a Civitas Inspire expert.
- For support and technical questions, email InspireSupport@utsa.edu. If you have questions about the training or this guide's content, please email Sapna.Naik@utsa.edu. If you have questions about Inspire's use at UTSA, email StudentSuccess@utsa.edu.

Introduction to Civitas Inspire

Inspire is a comprehensive case management platform that is part of Civitas Learning (which also includes Illume and Impact) made for appointments with professional staff and documenting interactions with students. It also includes reporting and communication functions as well as predictive analytics.

Benefits include the following:

- Inspire is a comprehensive case management platform, which allows for scheduling, notetaking, and reporting.
- You can see others' notes within the SSU for a network of support for a student.
- It's connected to Banner and Blackboard (LMS) and pulls in information daily/weekly.
- Inspire has potential for outreach to individual students and groups of students.
- Staff members can access analytics (Persistence Prediction and LMS Activity)

Limitations include the following:

- Default appointment labels are not descriptive.
- Appointment notes cannot be easily sorted by date.
- Not all possible functions are enabled, like texting students and student-facing functions.
- Most staff members are unable to see activity in other SSUs.
- We're currently unable to grant access to student workers.

Accessing Civitas Inspire

1. Login at <https://utsa.inspire.civitaslearning.com/login> with your UTSA credentials. I recommend bookmarking this page (not the SSO page that follows).
2. You'll find most of what you need linked from the homepage or "Dashboard" or from the left side menu (see Figure 1).
3. Use the search bar at the top to search for students. You can search using a student's name, Banner ID, or abc123.
4. Your "Calendar" in the "Connect" section will allow you to set up your availability, schedule appointments, and see upcoming appointments.
5. Click on "Advising Notes" under the "Advise" section or in the left side menu to see your notes as well as notes from others in your SSU.
6. You can create groups of students from "Groups" in the "Advise" section.
7. You can create and see reports from the "Report" section.
8. Click around and explore!

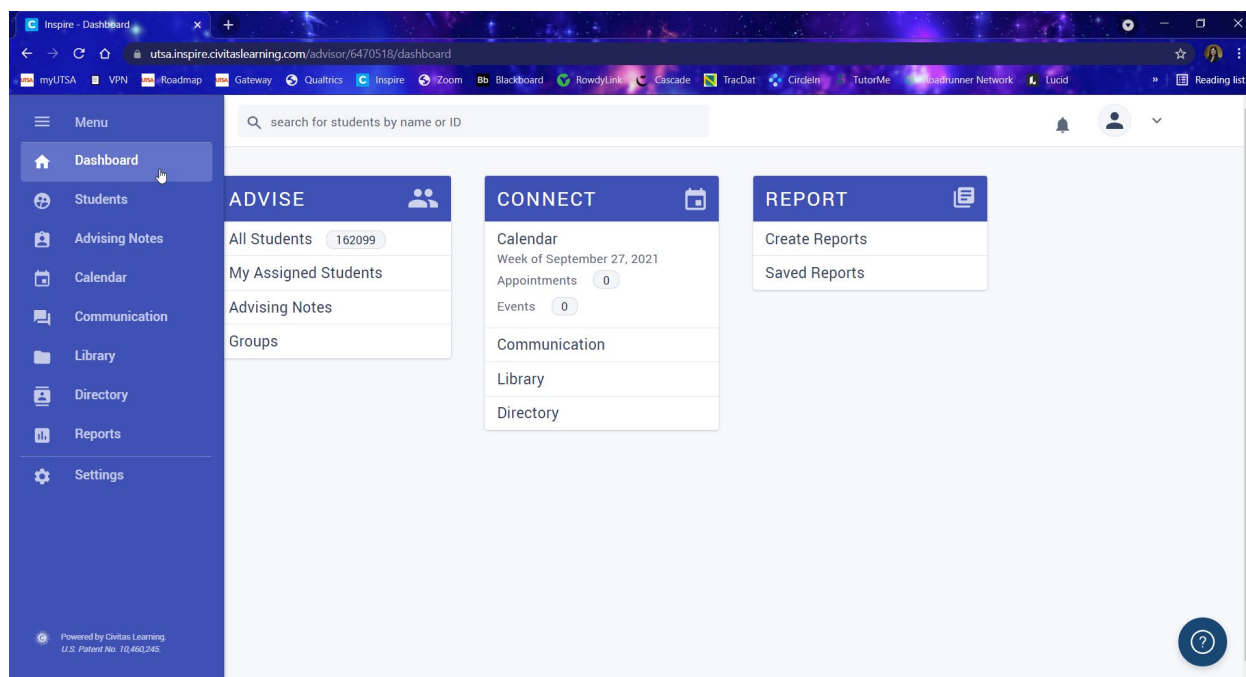


Figure 1. Dashboard page.

Syncing with Outlook

1. From the homepage, click on the wheel on the bottom left to get to Settings). You should see a screen as in Figure 2.
2. Scroll down to "Synced Calendars" and set up your calendar sync (Figure 3).

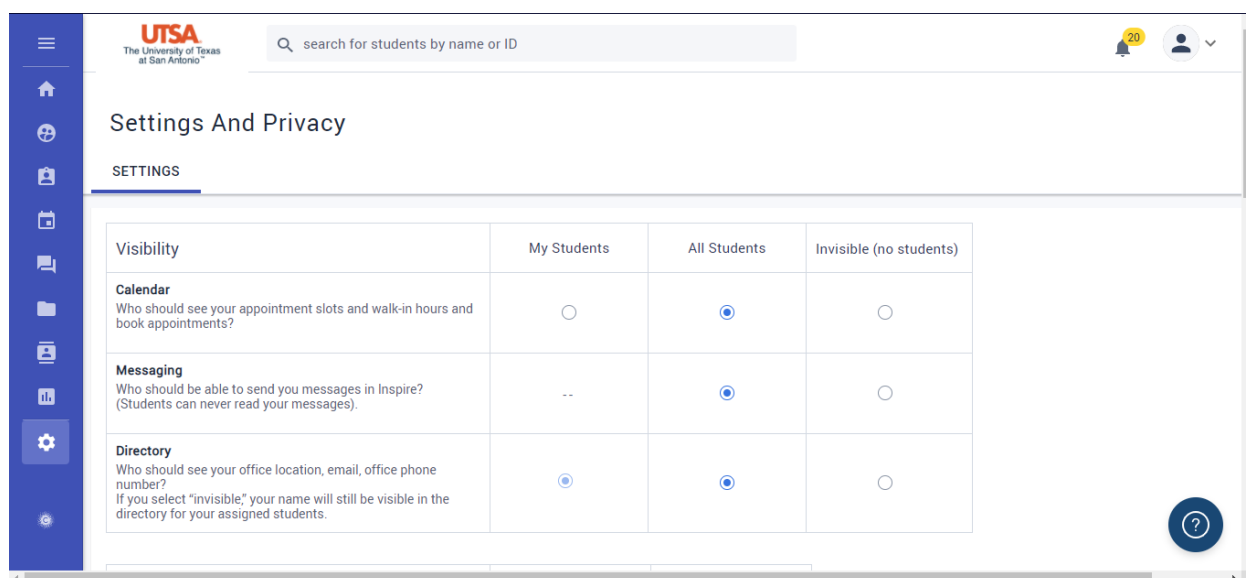


Figure 2. Settings page.

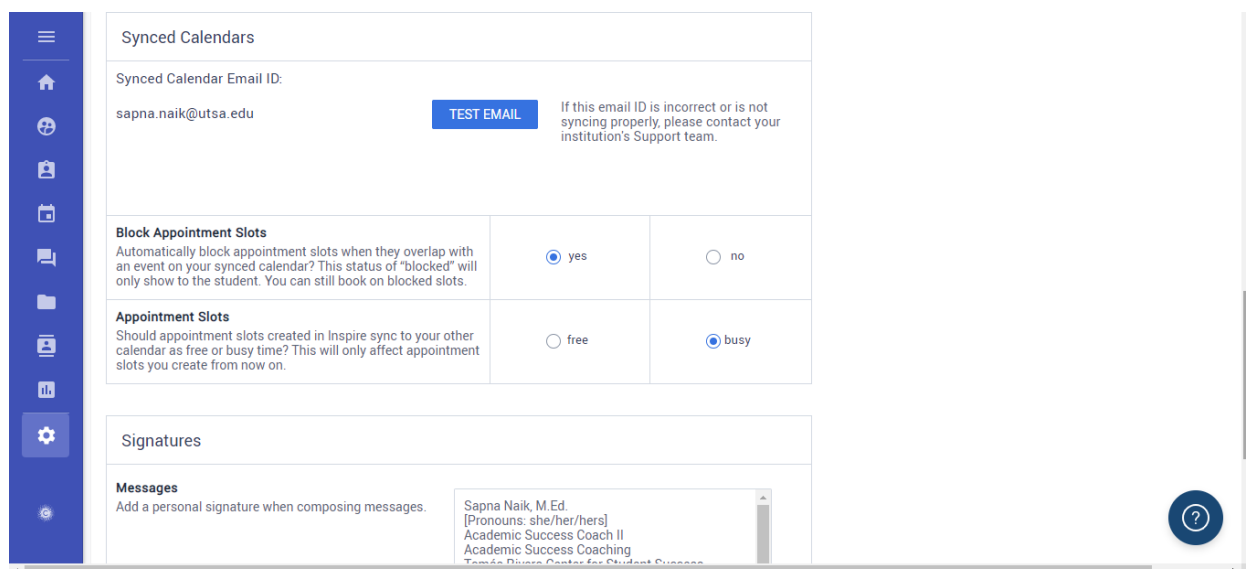


Figure 3. Synced Calendars section on the Settings page.

Setting up your availability

1. From your homepage, click Calendar, then the Calendar View tab
2. Click the blue box "+ CREATE" (Figure 4).
3. You should see a screen with "Appointment Slots." Choose your availability! Remember this will sync to your Outlook calendar so times that you block off on your Outlook calendar will not be available for appointments. Think of this as your general work hours.
4. When you go back to your calendar, you should see open boxes for your appointment availability (Figure 5). Your busy times will not show up on here based on your Outlook calendar, but don't worry, it knows them! If you do want to see them, click on your email address on the left side.
5. This will also email you an appointment invite for the times you set. You can decline it so you don't end up with what looks like blocks of appointments on your Outlook calendar.

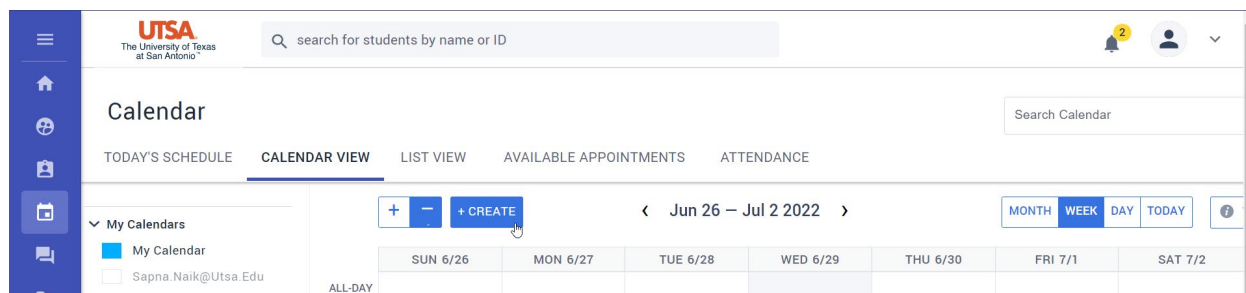


Figure 4. Calendar view.

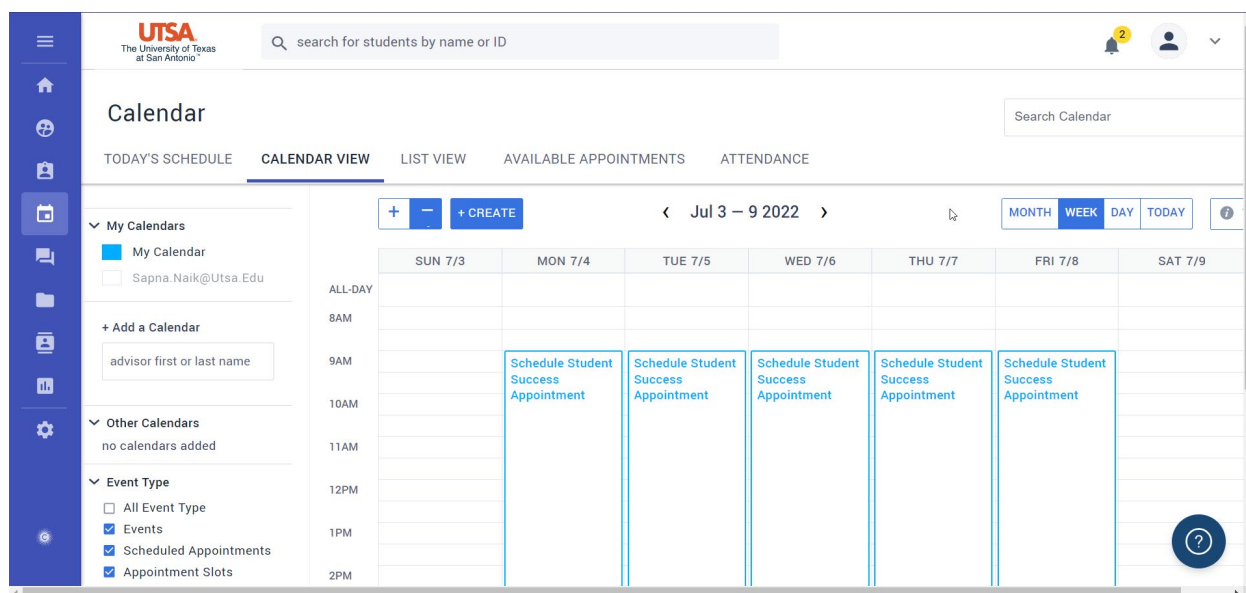


Figure 5. Calendar view after adding appointment slots.

Looking up student information

1. Search by name, Banner ID, or abc123 in the main search box on your home page.
2. Choose the appropriate student. (For practice, use Landis C Smith, as in Figure 6.)
3. From a student's page, you can see information including notes from others in your SSU, their courses and grades, and contact information (Figures 6 and 7).
4. From the student's page, you can schedule appointments and contact the student.

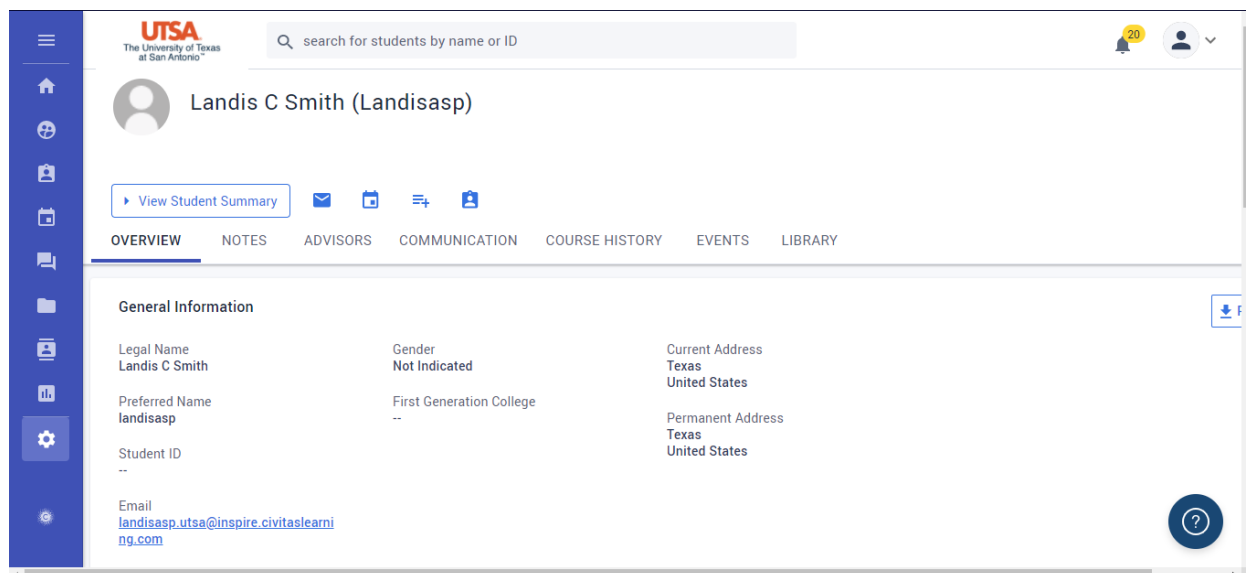


Figure 6. Demo student's page.

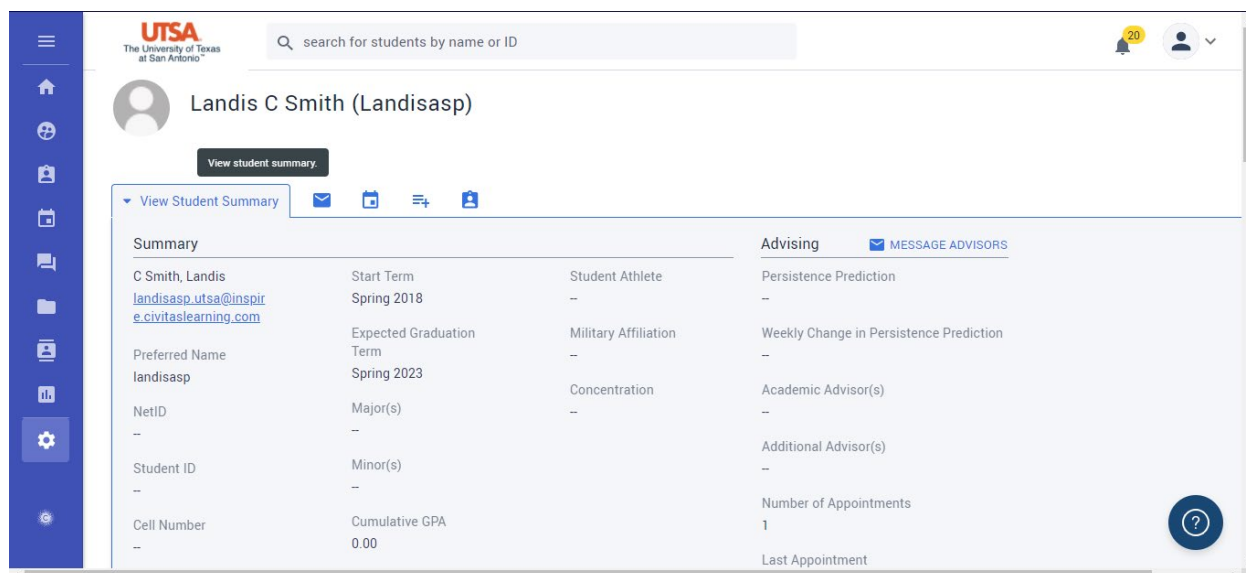


Figure 7. View Student Summary tab on a student page.

Scheduling appointments

1. The easiest way to schedule an appointment with a specific student is to go to their page, click the second icon of the calendar. When you hover over it, you should see "Schedule Appointment" (Figure 8).
2. Choose from the dropdown menus. Items marked with an * are required (Figure 9).
 - a. Appointment Type* – Schedule Ahead or On Call
 - b. Schedule using an appointment slot – this is the easiest way. Select your date, then choose the type from the available ones. If you have something on your Outlook calendar at that time, it'll appear as busy, but you can still schedule an appointment at that time (screenshot below).
 - c. Appointment modality* – In Person, On Call, Email, Phone, or Virtual Meeting. After choosing one, enter in details (e.g., Zoom link or phone number).
 - d. Date*, Start Time*, and End Time* will be entered if you have chosen a slot above. If you want to choose an appointment time manually, do it here.
 - e. Session Topics* – Choose the most appropriate topic(s). (Suggestion: with your team, come up with a convention).
 - f. Intake Note – Your student will not see this.
 - g. Session Note – Your student will see this in the email they receive.
 - h. Click "Add Appointment." If you chose a time that is busy on your Outlook calendar, it'll give you a box to confirm that you want to schedule the appointment.
3. After this, it'll send you a calendar invite (Figure 10). Suggestion: Accept but do not send a response.
 - a. The appointment should now show up on your Outlook calendar and in Inspire.

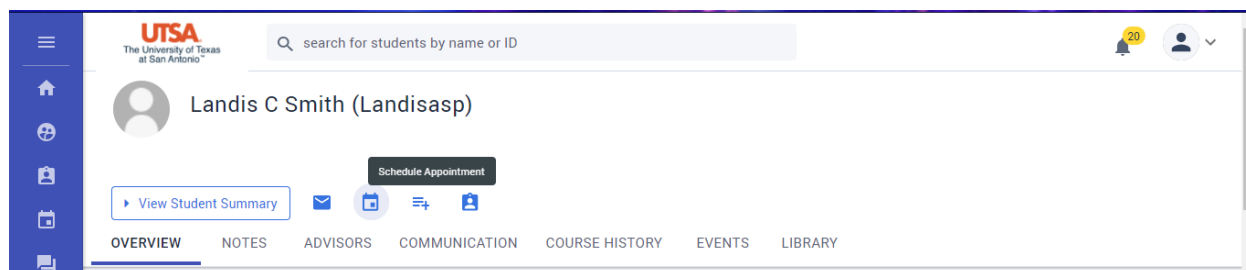


Figure 8. Schedule appointment from a student page.

UTSA The University of Texas at San Antonio

search for students by name or ID

← Back to Student Summary

Add Appointment

* Indicates a required field

Appointment

Student *

C Smith, Landis

C Smith, Landis
Undergraduate
Spring 2018 - Spring 2023

Appointment Type *

Appointment Type

Appointment Modality *

select appointment modality

Figure 9. Add Appointment page.

[EXTERNAL] Landis C Smith: Appointment - Meeting

Sun 4/25/2021 5:52 PM
University of Texas at San Antonio <noreply-inspire@civitaslearning.com>
[EXTERNAL] Landis C Smith: Appointment

Required ☐ Landis C Smith; ☒ Sapna Naik

Please respond.
This appointment conflicts with another one on your calendar.

When: Wednesday, April 28, 2021 10:00 AM-11:00 AM | Location: Virtual Meeting: Zoom: <https://utsa.zoom.us/j/3806322846>

++EXTERNAL EMAIL++
This email originated outside of The University of Texas at San Antonio.
Please exercise caution when clicking on links or opening attachments.

Appointment with Landis C Smith

Your appointment with: Landis C Smith

Appointment
When: Wednesday, April 28th, 2021, 10:00am - 11:00am(CDT)
Where:
Virtual Meeting:
Zoom: <https://utsa.zoom.us/j/3806322846>

Figure 10. Calendar invite for the appointment.

Editing and canceling appointments

1. You can edit or cancel an already scheduled appointment by clicking on your calendar from the homepage, then clicking on the blue box for the appointment (Figure 11).
2. You will see a screen "Edit Appointment" (Figure 12). If you want to change it to a different day and or time, you can do so from this screen. You can also update any information in the appointment intake and/or session notes. Then scroll all the way down and to the left, and click the blue "UPDATE" box (Figure 13).

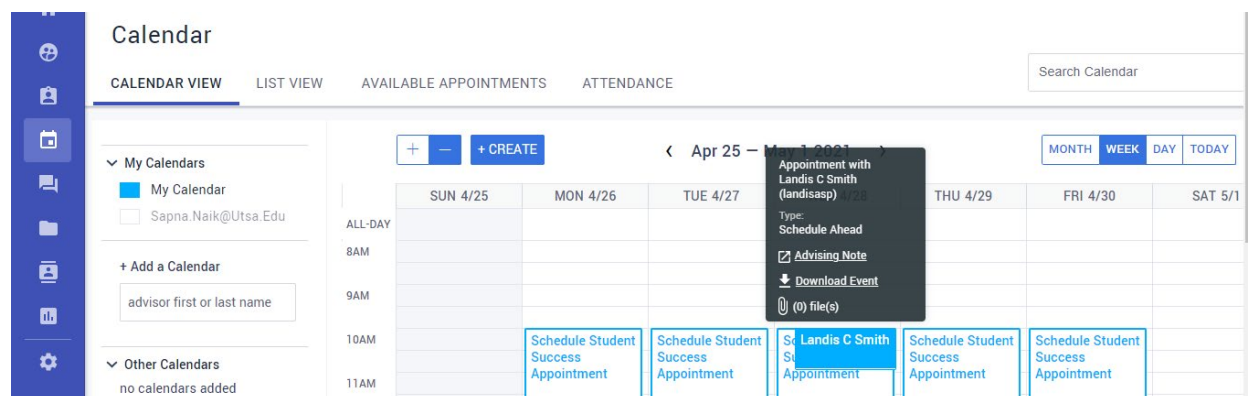


Figure 11. Editing or canceling an appointment from the calendar page.

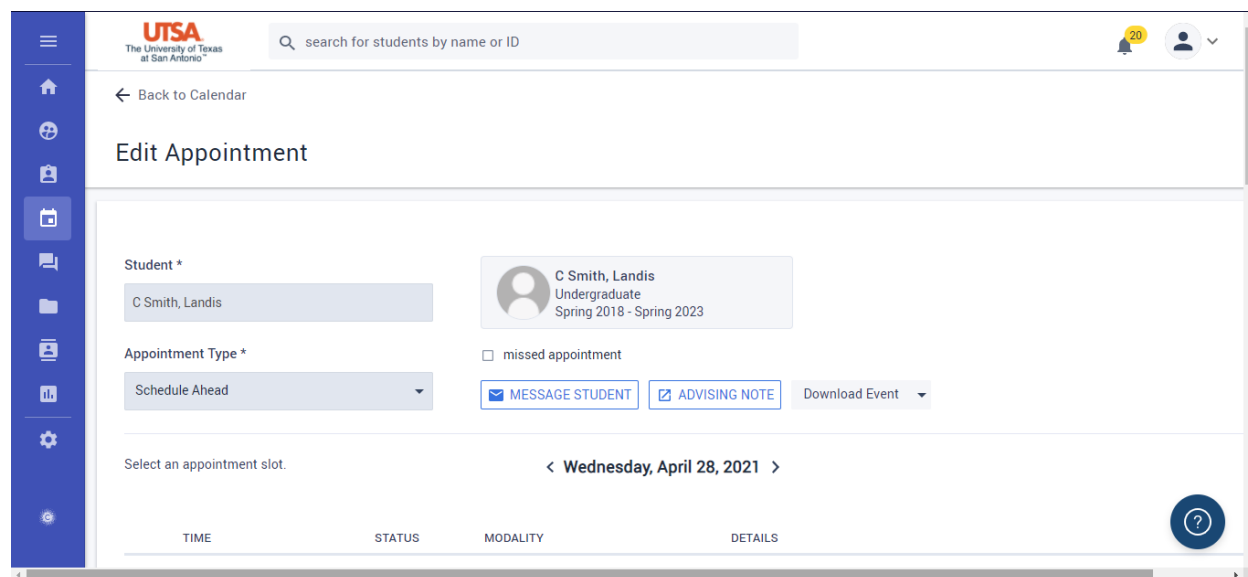


Figure 12. Editing an appointment.

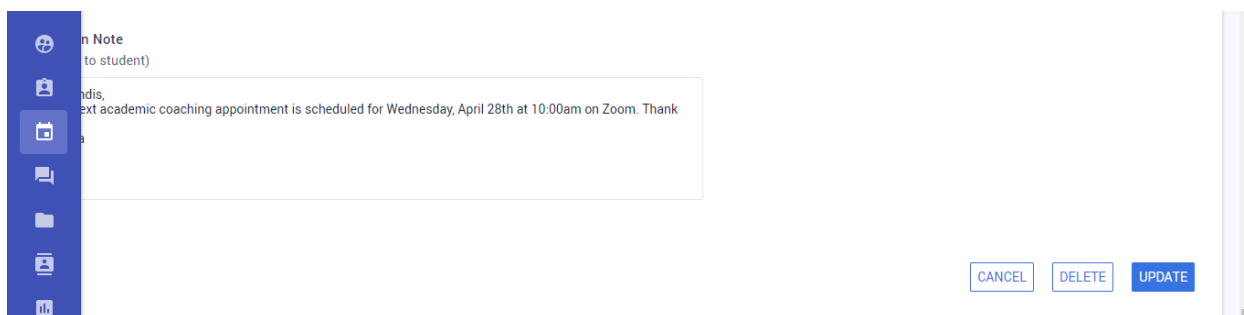


Figure 13. Updating or canceling an appointment.

3. To cancel the appointment, scroll all the way down and click, counterintuitively, the white "DELETE" box (Figure 13), not the "CANCEL" box.
4. It'll pull up a box with a notification that the appointment will be canceled and the student will be sent an email with that information. You can enter in an optional message to the student (Figure 14). Scroll down and click confirm. The appointment will no longer appear on your calendar, but it will appear in your Notes (Figure 15). You can change the subject line as well.

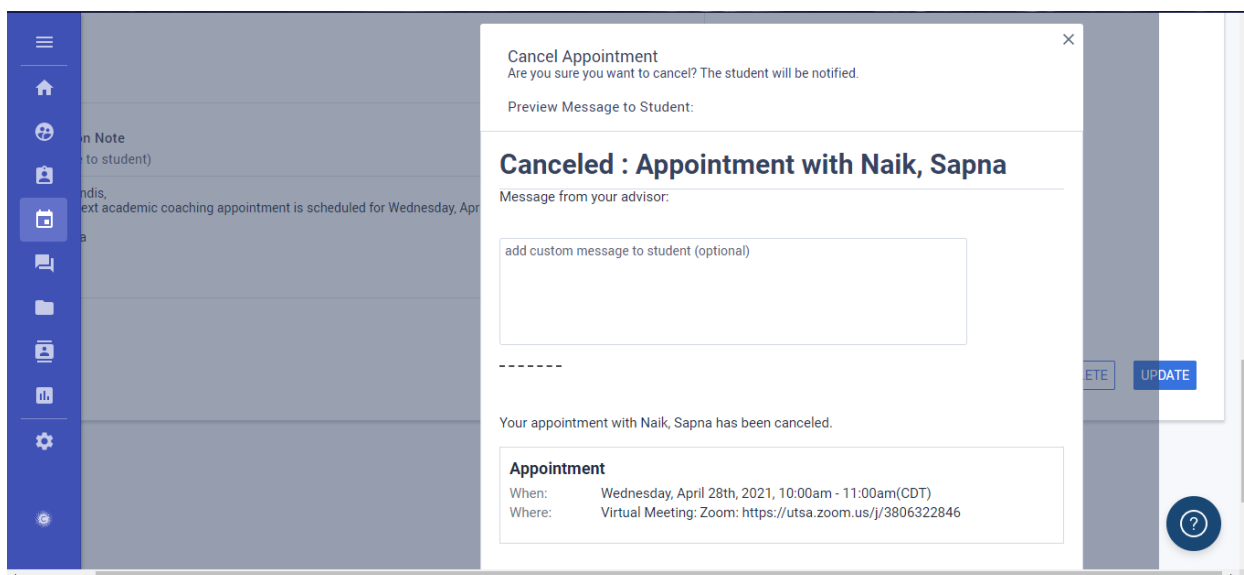


Figure 14. Canceling an appointment pop-up window.

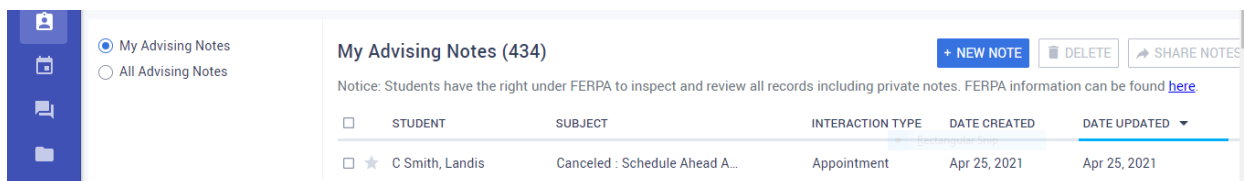


Figure 15. Canceled appointment appearing on your notes page.

Adding appointment notes

1. To add notes to an existing appointment, go to the student's page, click on "Notes" on the top menu, and choose the appropriate appointment (Figure 16).
2. Only use "+ NEW NOTE" if you are creating a note not attached to an appointment (for example, to document an email communication in between appointments).
3. Or, go to your calendar in Inspire, hover your cursor over the appointment, and click "Advising Note" (Figure 17).
4. Enter in information on this screen (Figure 18), and be sure to click "SAVE" frequently! It does not auto-save.
5. Suggestion: Change the name of the appointment, in the box that says, "Schedule Ahead Appointment," to something that has meaning. Come up with a convention with your team (e.g., 2022-06-30 – ASC – SHOWED). Since the appointments are not ordered by date, I recommend including the date in the name of the appointment!
6. If the student no showed to the appointment, indicate that in the subject line. You can also click the "Missed Appointment" box in the left column.
7. If necessary, you can share the note with other staff using the Share with others options on the right side (Figure 18).

The screenshot displays the UTSA Inspire system interface for a student named Landis C Smith. The top navigation bar includes the UTSA logo, a search bar for students by name or ID, and a notification bell with 20 alerts. The main content area features a sidebar with various icons and a top menu with tabs: OVERVIEW, NOTES, ADVISORS, COMMUNICATION, COURSE HISTORY, EVENTS, and LIBRARY. The 'NOTES' tab is selected, showing a section titled 'All Advising Notes (6)'. Below this, there is a table with columns: SUBJECT, AUTHOR, INTERACTION TYPE, DATE CREATED, and DATE MODIFIED. One note is highlighted, showing 'Schedule Ahead Appointment' by Naik, Sapna, with an appointment type of 'Schedule Ahead' and a date of 'Apr 28, 2021'. To the right of the table, there is a text area for adding a note, a 'Session Topics' section with 'Study Skills' selected, and a 'Note Privacy' section. Buttons for '+ NEW NOTE', 'DELETE', and 'SHARE NOTES' are also visible.

Figure 16. Adding a note to an existing appointment.

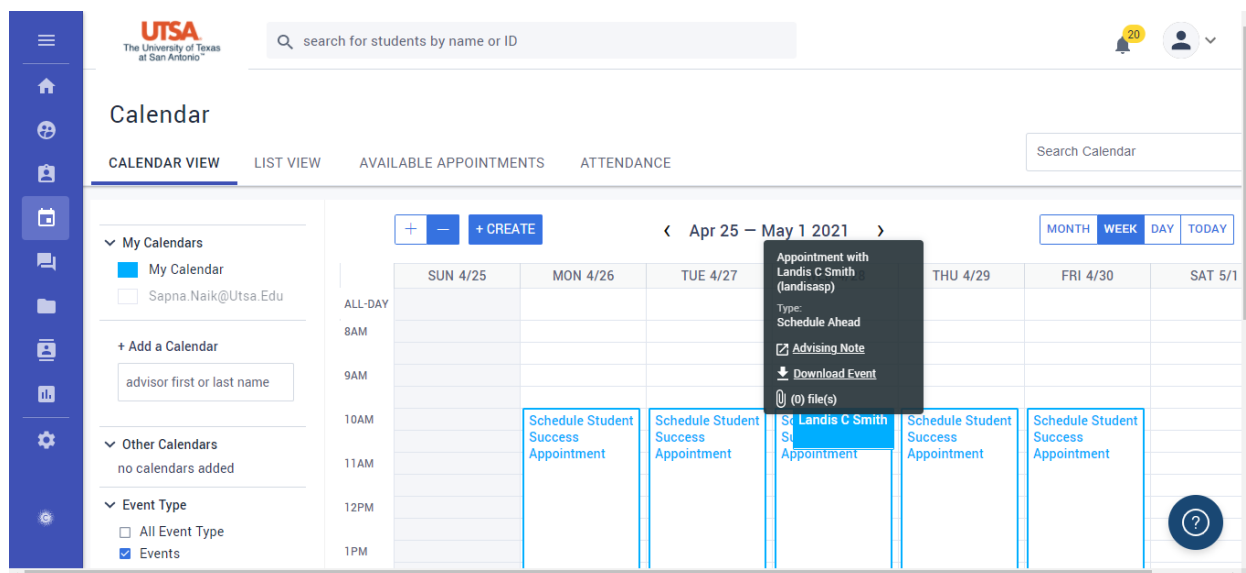


Figure 17. Adding a note to an existing appointment from the calendar page.

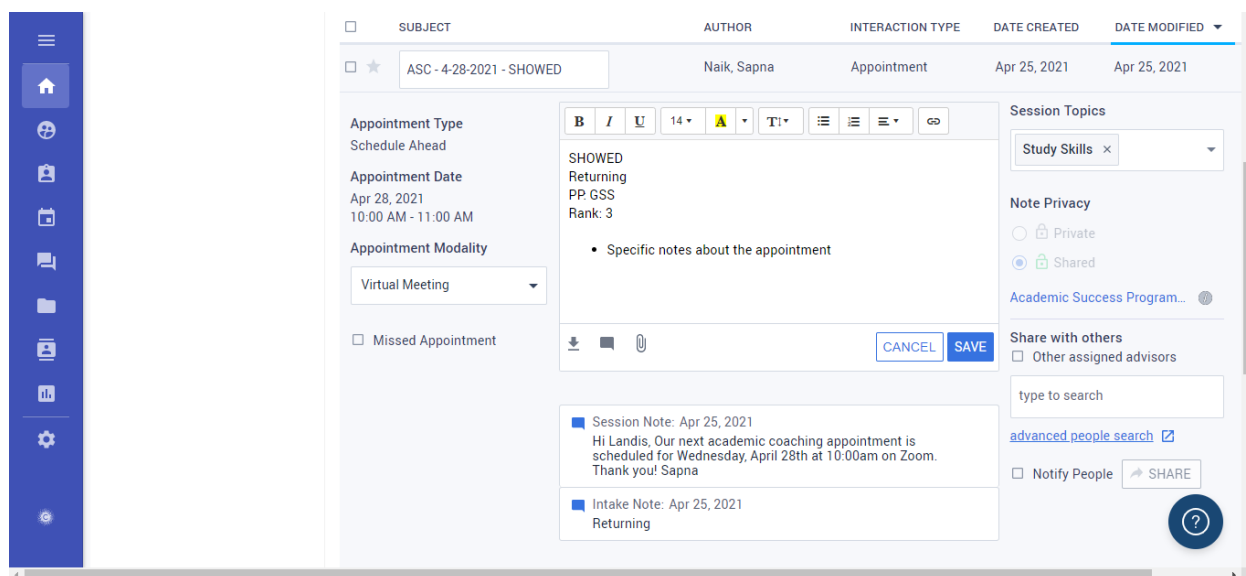


Figure 18. Adding information to the appointment note.

Seeing all notes for a student and all of your notes

1. To see all notes for a student, go to the student's page as indicated above, and click Notes in the top menu.
2. On the left side, you can choose "My Advising Notes" to see just yours or "All Advising Notes" to see all notes written by staff members in your SSU (Figure 19). You will not be able to see notes written by staff members outside of your SSU (e.g., I cannot see academic advisors' notes).
3. To see all of your notes across all students, go to the homepage and click "Advising Notes" or click the person symbol, 3rd down, on the left side menu (Figure 20).
4. From either of these screens, you can expand details and make changes by clicking on the note.



All Advising Notes (20)					
Notice: Students have the right under FERPA to inspect and review all records including private notes. FERPA information can be found here .					
<input type="checkbox"/>	SUBJECT	AUTHOR	INTERACTION TYPE	DATE CREATED	DATE MODIFIED
<input type="checkbox"/> ★	ASC - 4-23-2021 - SHOWED	Naik, Sapna	Appointment	Apr 21, 2021	Apr 23, 2021
<input type="checkbox"/> ★	ASC - 4-16-2021 - SHOWED	Naik, Sapna	Appointment	Apr 14, 2021	Apr 23, 2021
<input type="checkbox"/> ★	ASC - 4-12-2021 - CXRS	Naik, Sapna	Appointment	Apr 11, 2021	Apr 12, 2021
<input type="checkbox"/> ★	ASC - 4-6-2021 - SHOWED	Naik, Sapna	Appointment	Apr 05, 2021	Apr 06, 2021
<input type="checkbox"/> ★	ASC - 3-26-2021 - SHOWED	Naik, Sapna	Appointment	Mar 24, 2021	Apr 06, 2021

Figure 19. Advising notes for an individual student.

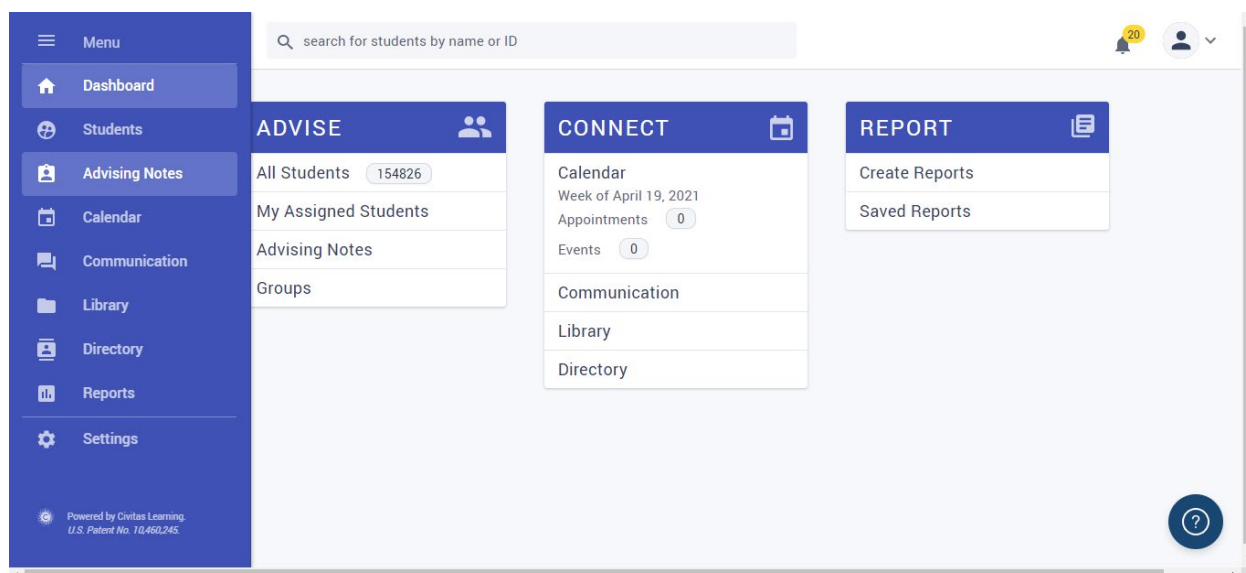


Figure 20. Click the Advising Notes button in the left menu to get to all of your notes.

Creating student groups

1. From the Dashboard, click "Groups" OR click "Students" from the left side menu, then click on the "Student Groups" tab. You'll get to a page like in Figure 21.
2. There are two different types of groups you can create: dynamic and static.
 - a. Dynamic groups: Students listed in dynamic groups change based on the criteria you select (for example, I had one "Active Undergraduate Students").
 - b. Static groups: Students listed in static groups do not change.
3. To create a new group, click the "Create Group" button. You'll have a choice to create a dynamic or static group (Figure 22).

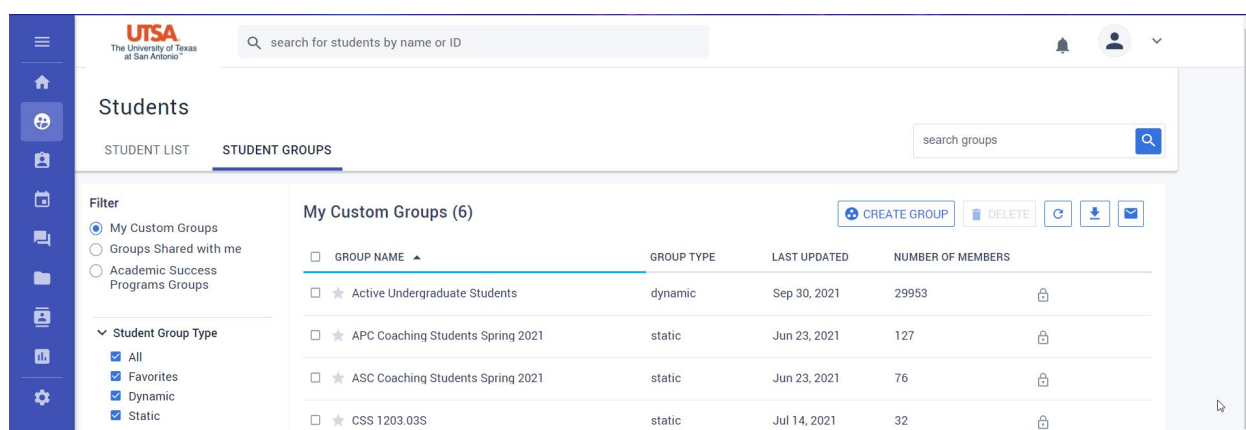


Figure 21. Student Groups page.

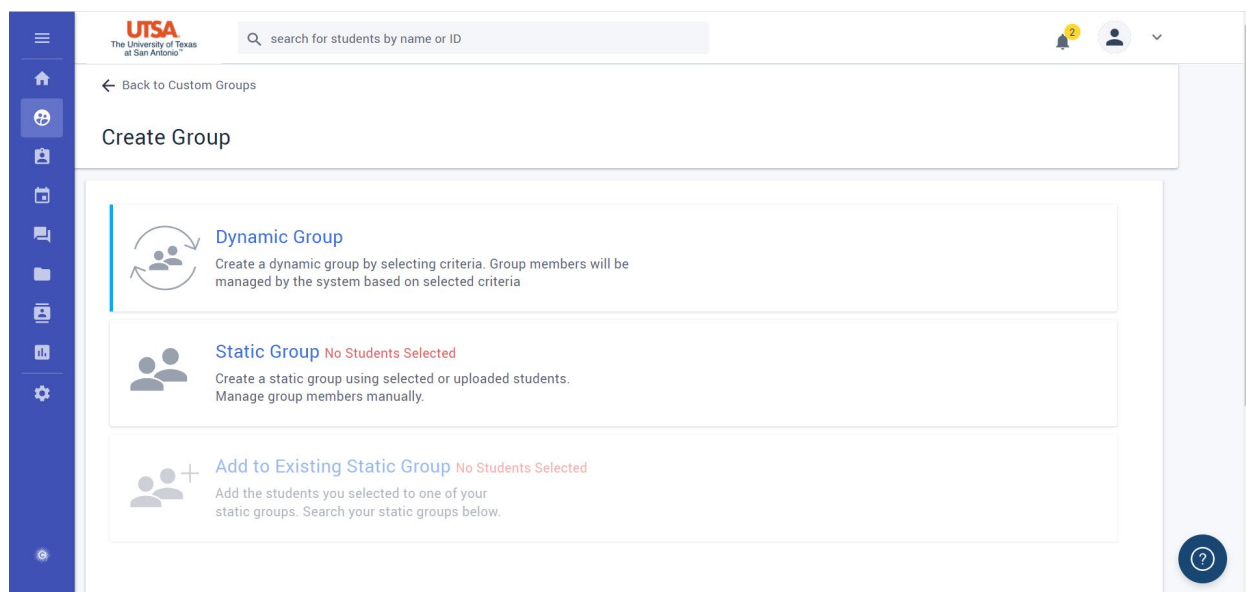


Figure 22. Create Group page.

Dynamic Groups

1. To create a dynamic group of students, first name your group something descriptive.
2. Then select your desired criteria. This can include, for example, all students in a particular class or college, for a particular term, or some other criteria. See Figures 23-24 below for many of Dynamic Group options you'll see.
3. For many of the categories, start typing in the box and you will see a list of options to choose from. Note that some categories have specific formats:
 - a. Course Number is listed as subject, a dash, and the course number (e.g., MAT-1073).
 - b. Section ID is listed with CRN, a dash, and the term code (e.g., 39036-202220).

Dynamic Group
Create a dynamic group by selecting criteria. Group members will be managed by the system based on selected criteria

Group name
Group Name *

Select criteria
Create group based on:

Students
☒ All
☐ My Assigned

☒ Active
☐ Inactive

Persistence Prediction
☐ Very Low
☐ Low
☐ Moderate
☐ High
☐ Very High

Weekly Change in Persistence Prediction
Select weekly change

☐ Only show students who have logged in
☐ Only show students who have never logged in

Student Search Criteria:
Students displayed will include:

✓ Student ID
✓ Major(s)
✓ Minor(s)/other
✓ Email address
✓ Cell Number

Add system activity data:
☐ Last Appointment
☐ Next Appointment
☐ Date Account Created
☐ Last Login Date

Click "*" to select additional data columns to display. Narrow down criteria as needed.

Academic Information
+ Degree
+ Major(s)
+ Minor(s)/other
+ Certificate
+ Department
+ College
+ GPA
+ Academic Standing
+ Enrolled Next Term
+ FTPT

Progress to Degree
+ Start Term/Year
+ Total Institutional Credits Earned
+ Completed Terms
+ Applied to Graduate
+ Transfer Credits
Courses
+ Term
+ Course Number
+ Section ID
+ Grade

Advising
+ Academic Advisor
+ Academic Coordinator (Athletic Advisor) Advisor
+ Access College and Excel Advisor
+ Additional Advisor
+ Arts & Humanities Advisor
+ Business Studies Advisor
+ Downtown Advisor
+ Engineering Advisor
+ Exploratory Programs Advisor

Figures 23-24. Dynamic Groups options page.

Static Groups

1. To create a static group, first name it something descriptive.
2. Then, you need to upload a list of students (Figure 25). The list of students must be uploaded as an Excel spreadsheet with one column of only Banner IDs.
3. Once you have created a static group, you can add students to that group or remove students. Choose your group from your Custom Groups list. Then on the top you will see "ACTIONS" with a down arrow. Choose "Add to Group" or "Remove from Group" (Figure 26).
4. For Static and Dynamic Groups, you can download the list as an Excel file by clicking on the download button on the top right of the group. You can also share this group, but it will share to everyone in your SSU.
5. Use the options on the left side to Add/Remove Columns (Figure 26).

Figure 25. Static Groups options page.

Figure 26. Group Details and adding or removing from group options.

Creating reports

1. From the Dashboard, select "Create Reports" or from the left side menu, click "Reports."
2. There are four types of reports (Figure 27): Students, Appointments, Advising Notes, and Event Attendance.
 - a. Students: Create lists of students in particular classes or based on any other criteria.
 - b. Appointments: Create lists of appointments, which can be narrowed down to just your appointments, appointments for several advisors, or appointments within a certain time frame. Note, you can also access appointments from your SSU. Note that this list does not include notes not attached to appointments.
 - c. Advising Notes: Create lists of all advising notes. Note that this does not necessarily include all scheduled appointments.
3. Select the type you would like and select the corresponding criteria to create your report.
4. You'll be able to download your report as an Excel file.

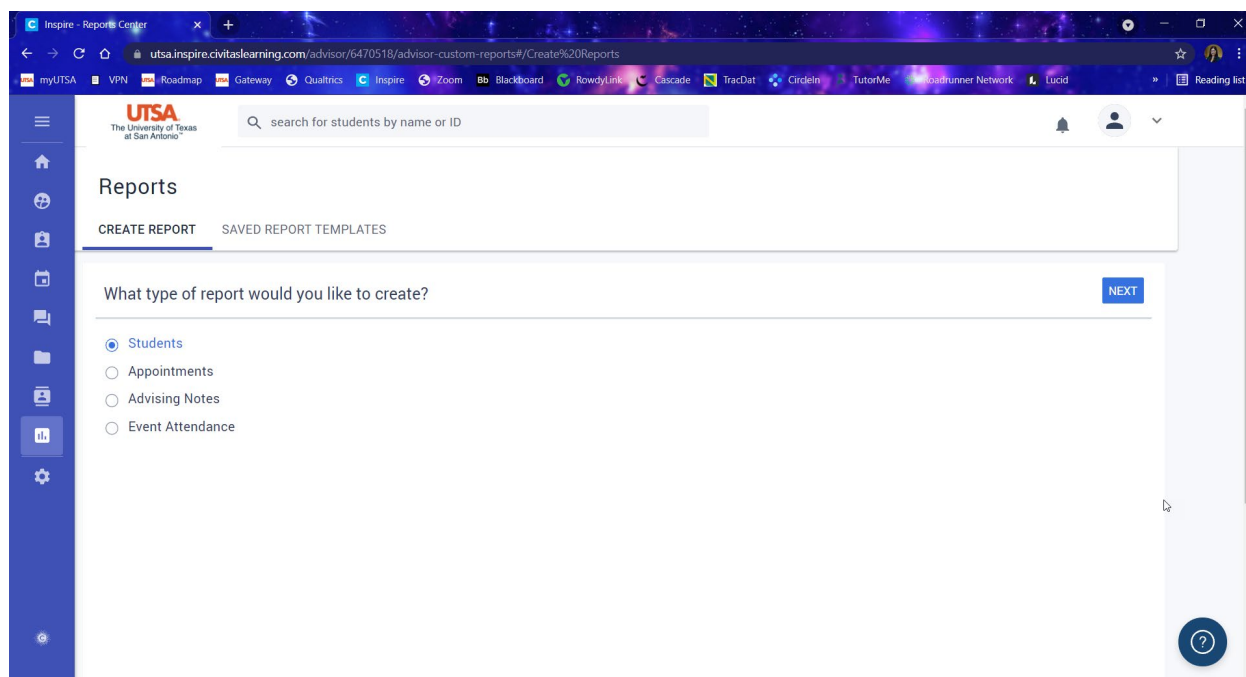


Figure 27. Create Reports page.

Acting on data (an introduction)

Civitas Inspire contains a lot of data that you can use in various ways! A caveat: It's important for you and your team to come up with a plan about how you will use the data available to you, particularly for outreach to students.

Persistence predictions, changes in persistence predictions (both in View Student Summary), and LMS engagement data (in Course History tab) are found in student views (Figures 28-29).

Persistence predictions and their changes are also available in student lists, groups, and reports (Figure 30).

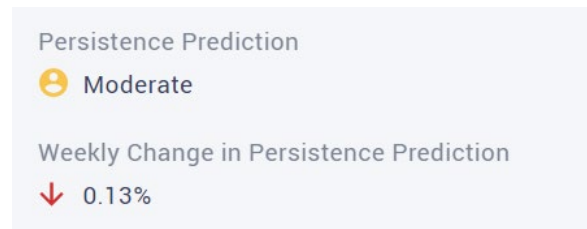


Figure 28. View of persistence prediction and its change in View Student Summary.

CREDITS	GRADE / AVG	UNIQUE LOGIN DAYS / AVG	TERM ▲
3.00	-- / --	1 / 8	SUMMER 2022
3.00	-- / --	1 / 8	SUMMER 2022

Figure 29. View of LMS engagement data in Course History tab.


PERSISTENCE PREDICTION	WEEKLY CHANGE IN PERSISTENCE PREDICTION
 Very High	0.00 % ↔
 Moderate	0.13 % ↓
 Very High	0.23 % ↑

Figure 30. Persistence prediction and weekly change in persistence prediction in student list view.

Messaging students

If you have a group of students created, you can message all or some of those students.

1. Visit your Groups page and select a group.
2. Select the students you want to message. The number at the top will indicate how many students are selected. Then click the envelope icon on the top left (Figure 31).
3. You can also message a student directly from their page.
4. Draft the message in the pop up box that appears (Figure 32). Be sure to check "Create an advising note from this message" (should be set by default).
5. Alternatively, you can download the list and send an email through Outlook.

Figure 31. Group Details view.

Figure 32. Compose a new message in Civitas Inspire.

Inspire Roles

At a basic level, the roles within each Student Success Unit are as follows:

Role	Unique Capability
Director	Most access
Administrative Assistant	Schedule appointments for others
Advisor	Schedule own appointments
Faculty	Alerts and messaging

For more complete information from Civitas Inspire, see the [document](#) they put out in Spring 2019 (noting that there may be specifics at UTSA not necessarily reflected in this document).

Student Success Units

For more information about your Student Success Unit, please connect with the leads noted in the table below:

Student Success Unit	Lead(s)
Academic Advising	Angie Barrera
Academic Success Programs	Maggie Floyd, Jill Ford, Daniel Ramirez-Escobedo
Academic Colleges	Mark Appleford, Tim Yuen
Student Athlete Academic Center	Shanda Hayden, Angie Barrera
Career & Engaged Learning	Cié Gee, Mario Vela
Engagement Programs	Demetrius (DJ) Johnson