

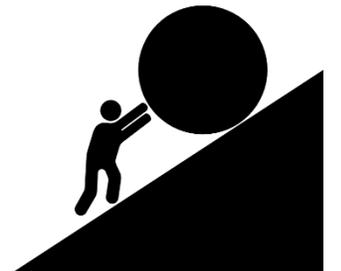


S3 Persistence Management User Guide

The Persistence Management screens offer information about students who are separated from the university and are expected to return in a future semester.

The following authorized S3 user types can access this information:

- Associate Deans
- Assistant Deans
- Student Affairs Contacts, both College Liaisons and Housefellows
- Senior Student Affairs Professionals
- Enrollment Services Staff



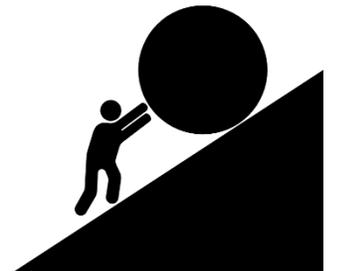
As part of S3 MyCommunity, the goals of the persistence screens are to:

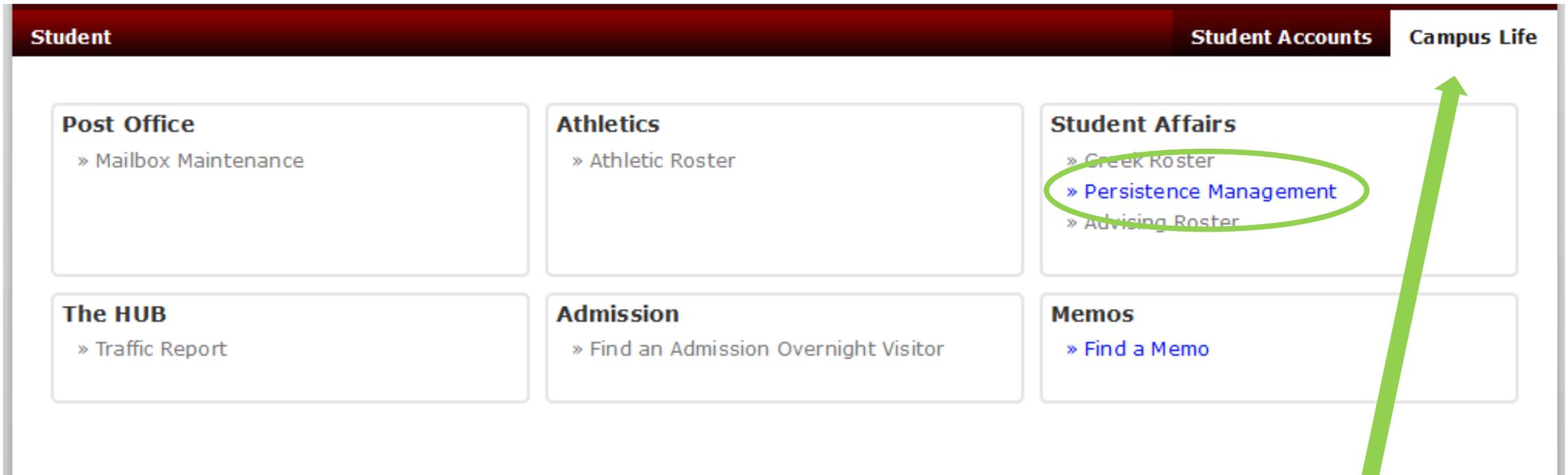
- 1. Improve the opportunity for shared responsibility for retention and persistence efforts**
 - Users have a current and centralized list of students to engage with regarding retention
 - Easier to “work the lists” through active student outreach and collaboration with other student support colleagues
- 2. Inform other student support colleagues via S3 Memos features**
 - S3 Memos are woven into the persistence screens allowing for notifications and task assignment
- 3. Dynamically update data on students separated from the university**
 - Users can view and update each student’s return status, as information is obtained



The persistence screens allow users to do the following:

- Access an up-to-date roster of separated students
 - *Users will only be able to view the students which they are already authorized to view in S3 (i.e., an associate dean in CFA will only see CFA students from the persistence cohort)*
- Filter and sort the roster for case management
- Navigate from the S3 roster to individual student records
- Add memos to a student's record with updates related to the separation and the plan to return (or not return)
- Use the information to appropriately make or request updates to a student's record including information about planned returns or to permanently exit a student who does not plan to return (i.e., complete withdrawal process)





To get started, select the Campus Life tab in your S3 Admin Console and click the Persistence Management link.

Persistence Management

Find a Cohort

The screenshot shows the 'Persistence Management' interface with the following search filters:

- PERSISTENCE COHORT:** F20 - Fall 2020 (highlighted with a green circle)
- COLLEGE:** (empty)
- ENROLLMENT STATUS:** AB - Absentia; BB - Ineligibl
- LAST NAME(%):** (empty)
- DEPARTMENT:** (empty)
- EXPECTED RETURN:** (empty)
- FIRST/PREFERRED NAME(%):** (empty)
- CLASS:** (empty)
- USER ID:** (empty)
- REASON:** (empty)

Buttons: Find, Clear

NOTE: % character can be used for wildcard searching on fields labeled with (%).

When students separate from the university, or their [enrollment status](#) changes to certain select criteria, they are added to the Persistence Cohort for that semester.

Select a semester from the dropdown menu for the Persistence Cohort that you wish to view.

Note: Visiting/Non-Degree students are not included in Persistence Cohorts. Persistence Cohorts will only include Pittsburgh-campus undergraduate and graduate degree-seeking students.

Persistence Management

Find a Cohort

The screenshot shows the 'Persistence Management' search interface. The 'ENROLLMENT STATUS' field is highlighted with a green circle and contains the text 'AB - Absentia; BB - Ineligibl'. The 'EXPECTED RETURN' field is also highlighted with a green circle. The 'REASON' field is highlighted with a green circle. A green arrow points from the 'REASON' field to the 'Reason' dialog box shown in the bottom right. Another green arrow points from the 'EXPECTED RETURN' field to the 'Expected Return' dialog box shown in the bottom middle. A third green arrow points from the 'ENROLLMENT STATUS' field to the 'Enrollment Status' dialog box shown in the bottom left. The interface includes fields for PERSISTENCE COHORT (F20 - Fall 2020), COLLEGE, DEPARTMENT, CLASS, LAST NAME(%), FIRST/PREFERRED NAME(%), and USER ID. There are 'Find' and 'Clear' buttons at the bottom right. A note at the bottom left states: 'NOTE: % character can be used for wildcard searching on fields labeled with (%)'.

You can further filter the cohort by selecting additional categories, like those shown below. Under the categories, you may select all that apply.

The 'Enrollment Status' dialog box shows a list of categories. Under 'Selected:', 'AB - Absentia' and 'BB - Ineligible to Enroll' are checked. Under 'Available:', 'AB - Absentia', 'BB - Ineligible to Enroll', 'D1 - Drop/Academic Performance', 'D2 - Drop/Academic Integrity', 'DS - Deceased', and 'E1 - Enrolled' are listed with checkboxes.

The 'Expected Return' dialog box shows a list of categories. Under 'Selected:', 'Graduated', 'Graduation Pending Without Return', 'Return Not Expected', and 'Withdrawn' are checked. Under 'Available:', 'Graduated', 'Graduation Pending Without Return', 'Return Not Expected', 'Withdrawn', 'S22', and 'F21' are listed with checkboxes.

The 'Reason' dialog box shows a list of categories. Under 'Selected:', 'Economic /Financial', 'MilitaryService', and 'Personal' are checked. Under 'Available:', 'Academic', 'Administratively Withdrawn', 'Economic /Financial', 'FamilyIllness / Death', 'Involuntary Withdrawal (W3)', and 'Leave of Absence/Student Affairs' are listed with checkboxes.

Persistence Management

View a Cohort

Persistence Management

PERSISTENCE COHORT: ?

LAST NAME(%): ?

FIRST/PREFERRED NAME(%): ?

USER ID:

COLLEGE: ?

DEPARTMENT: ?

CLASS: ?

REASON: ?

ENROLLMENT STATUS: ?

EXPECTED RETURN: ?

NOTE: % character can be used for wildcard searching on fields labeled with (%).

✓ 182 matches found

LAST NAME	FIRST NAME	PREFERRED NAME	USERID	ENTRY COHORT	COL	DEPT	CLASS	NEXT SEM	ENR STATUS	REASON	LAST CONTACT BY	LAST CONTACT DATE	EXPECTED RETURN
Abelert	Abella		testid1	F17	CIT	ECE	4	S21	R3				
Allasar	Albert		testid2	F18	CIT	ECE	3	S21	LA				
Alexandra	Alex		testid3	F16	CIT	MEG	10	S21	LA				
Allanson	Allan		testid4		CIT	MEG	10	F20	W1				
Allenire	Allen		fakeemail1	F15	CIT	MEG	4	S21	S4				
Franklin	Frankford	Frank	franksid		CIT	ECE	10	S21	LA				

NEXT SEM & ENR STATUS indicate the student's enrollment status for their most future "NEXT SEM" semester. This information can inform the priority and type of outreach.

For example:

When viewing the Fall 2020 cohort, if a student's NEXT SEM displays R3 for S21, the outreach is not "Are they returning?", but rather "Do they need any resources to ensure a smooth return?"

TIP: [View a listing of S3 codes and descriptions](#) for enrollment statuses. Enrollment status codes for separations are LA, LS, S1, S2, S3, S4 and W1. An R3 enrollment status is used when the student is eligible to return.

Persistence Management

Sort a Cohort & View a Student

Persistence Management 

PERSISTENCE COHORT: ?

LAST NAME(%): ?

FIRST/PREFERRED NAME(%): ?

USER ID:

COLLEGE: ?

DEPARTMENT: ?

CLASS: ?

REASON: ?

ENROLLMENT STATUS: ?

EXPECTED RETURN: ?

NOTE: % character can be used for wildcard searching on fields labeled with (%).

 **182 matches found**

<u>LAST NAME</u>	<u>FIRST NAME</u>	<u>PREFERRED NAME</u>	<u>USERID</u>	<u>ENTRY COHORT</u>	<u>COL</u>	<u>DEPT</u>	<u>CLASS</u>	<u>NEXT SEM</u>	<u>ENR STATUS</u>	<u>REASON</u>	<u>LAST CONTACT BY</u>	<u>LAST CONTACT DATE</u>	<u>EXPECTED RETURN</u>
Abelert	Abella		testid1	F17	CIT	ECE	4	S21	R3				
Allasar	Albert		testid2	F18	CIT	ECE	3	S21	LA				
Alexandra	Alex		testid3	F16	CIT	MEG	10	S21	LA				
Allanson	Allan		testid4		CIT	MEG	10	F20	W1				
Allenire	Allen		fakeemail1	F15	CIT	MEG	4	S21	S4				
Franklin	Frankford	Frank	franksid		CIT	ECE	10	S21	LA				

You can sort your results by clicking on any of the column headings.



Click on a student's name to navigate directly to that student's record.

Persistence Management

Student Record

Andrew Carnegie ESQ.

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE
Andy andrewcarnegie0 he, him, his an-droo No No

Summary Profile Academic Records Memos Student Account **Campus Life**

Student Affairs Persistence

Persistence Cohort for semester: **Fall 2020**

Please review this student's enrollment status before contacting them.

SEM	COL	DEPT	CLASS	ENR STATUS	PROGRAM	SEM UNITS
F20	CIT	ECE	10	S4 Suspension/Admin Restrict	ECE ECE/SE Standard Program - 1	0.0

Contact Info acesq@andrew.cmu.edu

Permanent Address: CARNEGIE WEAVING, DUNFERMLINE 00000 GB
and Int. Phone: Last updated on 05 Sep 2017 12:08 PM EDT

Mobile Phone: Personal Email: thehub@andrew.cmu.edu **Edit Contact**

Persistence Info

Reason for Leave

Reason: Administratively Withdrawn Expected Return: Withdrawn **Edit Reason**

Last Contact Info

Last Contact By: Last Contact Date: **Add Last Contact**

Be sure to select the semester for which you wish to view information about the student, as they may be included in a Persistence Cohort for multiple semesters.

Some students may have yellow banners on their detail page. Yellow banner shows if ENR STATUS is G1, G2, S1, S3, S4, LS, BB. [View code descriptions.](#)

Persistence Management

Important Contacts

24 Oct 2007 John Papinena Ent Services Student TEST RECORD This record has been used...

Important Contacts

NAME	TITLE	PHONE	LOCATION
James Bain	Primary Major Academic Advisor	+1 412 268 3602	REH
Melissa Skasik	Hub Liaison	+1 412 268 8186	WH
M Shernell Smith	College Liaison	+1 412 268 2150	CUC

ROTC: NAVY

Athletics:

Greek Affiliation:

On a student's persistence record screen, you can scroll to the bottom of the screen (underneath the memos) to view the student's Important Contacts.

Clicking on the name of the contact will allow you to email that contact.

Persistence Management

View Memos

Memos Add Memo

✓ 93 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
02 Nov 2020	Janet Peters	Student Persistence	Persistence	REASON FOR LEAVE	Economic /Financial	
02 Nov 2020	Janet Peters	Student Persistence	Persistence	EXPECTED RETURN	F21	
02 Nov 2020	Janet Peters	Enr Services Student	Enrollment Condition	ENR STAT CH	Authorized by: Janet Pete...	

Only two types of Memo Domains are shown on a student's persistence record: Student Persistence and Enr Services Student. The persistence screen will display memos related to the student's enrollment status and persistence efforts. Every individual who has access to the student's persistence record will view the same memos on this screen.

Summary Profile Academic Records **Memos** Student Account Campus Life

Student Memos Best Practices for S3 Memos

SUBJECT/BODY:

DATE FROM: DATE TO:

AUTHOR:

MEMO DOMAIN:

MEMO TOPIC:

ATTRIBUTE:

Find More Find Clear

✓ 5 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
02 Nov 2020	Janet Peters	Student Persistence	Persistence	REASON FOR LEAVE	Economic /Financial	
02 Nov 2020	Janet Peters	Student Persistence	Persistence	EXPECTED RETURN	F21	
30 Jul 2019	Amy Yearwood	University Acad Advising	Other	Exploring career options	Disillusioned with becomi...	
18 Nov 2014	Joanna Dickert	Student Persistence	Persistence	REASON FOR LEAVE	Administratively Withdrawn	
18 Nov 2014	Joanna Dickert	Student Persistence	Persistence	EXPECTED RETURN	Withdrawn	

To see other types of memos associated with the student's record, click on the "Memos" tab at the top of the screen. This Memos screen will only display memos that the user has general permission to view.

Persistence Management

Actions to Take

Student Affairs
Persistence

Persistence Cohort for semester: **Fall 2020**

Please review this student's enrollment status before contacting them.

SEM	COL	DEPT	CLASS	ENR STATUS	PROGRAM	SEM UNITS
F20	CIT	ECE	10	S4 Suspension/Admin Restrict	ECE ECE/SE Standard Program - PIT	0.0

Contact Info

Permanent Address: CARNEGIE WEAVING, DUNFERMLINE 00000 GB
and Int. Phone: Last updated on 05 Sep 2017 12:08 PM EDT

Mobile Phone: Personal Email: acesq@andrew.cmu.edu **Edit Contact**

Persistence Info

Reason for Leave

Reason: Administratively Withdrawn Expected Return: Withdrawn **Edit Reason**

Last Contact Info

Last Contact By: Last Contact Date: **Add Last Contact**

Memos

91 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
------	--------	--------	-------	---------	---------	------------



There are a number of actions you can take on a student's persistence record - some actions automatically insert a memo and some do not.

To prepare students who may be returning for a future semester, **we recommend reviewing and contacting students in each priority persistence cohort.** Doing so will help support their return and persistence to graduation.

If a student plans on continuing their separation...

- ▶ update the reason for their leave and expected semester of return on their persistence record (*see Edit Reason for Leave on page 16 of this guide*)

If a student plans on returning...

- ▶ update their expected semester of return and ask that they complete and submit a [Petition to Return from Leave of Absence form \(pdf\)](#)

If a student has decided to withdraw from CMU or has transferred to another institution...

- ▶ update their expected semester of return to “Return Not Expected” and ask that they complete and submit a [Withdrawal form \(pdf\)](#) (you may also complete and submit this form on their behalf)

In all cases in which you engage with a student...

- ▶ update the Last Contact Info with your information and the date of the contact (*see Add Last Contact on page 17 of this guide*)

Persistence Management

Edit Contact Info

Andrew Carnegie ESQ.

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE
Andy andrewcarnegie0 he, him, his an-droo No No

Edit Contact Info

Country:

Line 1:

Line 2:

City, Postal Code:

Phone: International Format [Use US Format](#)

Mobile Phone: - - US Format [Use International Format](#)

Personal Email:

SEM UNITS
0.0

Edit Contact

Memos

94 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
------	--------	--------	-------	---------	---------	------------

Clicking the Edit Contact button will open a box in which you can edit the student's current contact information.

TIP: A memo is NOT automatically inserted when Contact Info is updated.

Persistence Management

Edit Reason for Leave

The screenshot shows two instances of the 'Edit Reason for Leave' dialog box. The top dialog has 'Reason:' set to 'Administratively Withdrawn' and 'Expected Return:' set to a blank field. The bottom dialog has 'Reason:' set to 'Personal' and 'Expected Return:' set to 'Withdrawn'. A green arrow points from the 'Expected Return:' dropdown in the bottom dialog to the 'Edit Reason' button in the background interface.

Clicking the Edit Reason button will allow you to edit the reason for the student's leave, as well as the expected return date or situation.

If a student plans on continuing their separation, update the reason for leave and expected semester of return.

If a student plans on returning, update their expected semester of return and ask that they complete and submit a [Petition to Return from Leave of Absence form \(pdf\)](#).

If a student has decided to withdraw from CMU or has transferred to another institution, update their expected semester of return to "Return Not Expected" and ask that they complete and submit a [Withdrawal form \(pdf\)](#) (you may also complete and submit this form on their behalf).

TIP: A memo is automatically inserted when the reason for leave and/or expected return information is updated.

Persistence Management

Add Last Contact

Andrew Carnegie ESQ.

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE
Andy andrewcarnegie0 he, him, his an-droo No No

Summary Profile Academic Records Memos Student Account **Campus Life** Documents

Student Affairs Persistence

Persistence Cohort for semester: Fall 2020
SEM COL DEPT CLASS ENR STATUS PROGRAM SEM UNITS
Spring 2021
Fall 2020 0.0

Edit Last Contact Info

Last Contact By: jp7p
Last Contact Name: John Papinchak
Last Contact Date: 04 Nov 2020

Save Cancel

Reason for Leave
Reason: Personal
Return: F21 - Fall 2021

Last Contact Info
Last Contact By: Janet Pe
Last Contact Date: 04 Nov 2020

Memos
94 matches found

DATE AUTHOR DOMAIN TOPIC SUBJECT PREVIEW ATTRIBUTES

In all cases in which you engage with a student, update the Last Contact Info with your Andrew User ID and the date the contact took place.

TIP: A memo is automatically inserted when Add Last Contact is updated.

Persistence Management

Add a Memo

Andrew Carnegie ESQ.

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE
Andy andrewcarnegie0 he, him, his an-droo No No

Summary Profile Academic Records Memos Student Account **Campus Life** Documents

Student Affairs Persistence

Persistence Cohort for semester: **Fall 2020** (dropdown menu showing Spring 2021, Fall 2020, Fall 2014)

SEM	COL	DEPT	CLASS	ENR STATUS	PROGRAM	SEM UNITS
F20	CIT	ECE	10	LA Leave of	ECE ECE/SE Standard Program - PIT	0.0

Contact Info

Permanent Address: CARNEGIE WEAVING, DUNFERMLINE 00000 GB
and Int. Phone: Last updated on 05 Sep 2017 12:08 PM EDT

Mobile Phone: Personal Email: acesq@andrew.cmu.edu **Edit Contact**

Persistence Info

Reason for Leave

Reason: Economic /Financial Expected Return: F21 - Fall 2021 **Edit Reason**

Last Contact Info

Last Contact By: Last Contact Date: **Add Last Contact**

Memos

94 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
------	--------	--------	-------	---------	---------	------------

Persistence Management utilizes the existing S3 Memos functionality. You may wish to add a memo to communicate with other support staff (by notifying and assigning tasks) and/or to create a record of contact with the student and recommended actions.

For example, an associate dean may wish to notify a HUB liaison to reach out to a student planning for a return from leave regarding financial aid matters.

To add a memo to this student's record, select the Add Memo button.

Persistence Management

Add a Memo

Andrew Carnegie ESQ. 🔊

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE

Andy

Summary Profile

Student Affairs Persistence

Add Memo for Andy Carnegie Who can see this memo?

Domain: Student Persistence

Topic: Persistence

Template: Select a Template or enter a Subject

Subject: Select a Template or enter a Subject

ContactNotes

UnableToContactNotes

B *I* U **B** *I* U **B** *I* U **B** *I* U

Highlight Color Font Color Font Size

Notify: ?

Task: Create Task

Save Cancel

93 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
02 Nov	Janet Peters	Student	Persistence	REASON FOR LEAVE	Economic /Financial	

View the [S3 Memos User Guide](#) for a refresher on how to use memos.

TIP: To help exercise appropriate diligence and ensuring privacy when noting discussions with a student, be sure to refer to the [Best Practices for S3 Memos & Stellic Notes](#) document when writing a memo.

Thank you for your support of the Student Services Suite (S3) and for using S3 Persistence Management. For additional questions or comments about Persistence Management, use the Feedback link, which can be found in the top right corner of your S3 Admin Console homepage.



Be sure to stay tuned to the [S3 Updates webpage](#) for release summaries, user documentation, training sessions, and more.



Follow [@CarnegieMellonS3](#) on Facebook and Instagram, or [@S3CMU](#) on Twitter, for news and updates!