



Previous: [Tracking Classroom Attendance](#) | [Back to Guide](#)

Summary: On this page, we discuss Action plans, Action-items, and Action-packs. How to create referrals and close them, as well as follow up and commenting Action-items and Action packs statuses.

AccuCampus Action Plans

Action Plans are a great mechanism for **Center Admins** to engage the **Students** in helping themselves work through a set of tasks that need to be completed on campus. **Action Plans** can be assigned to individuals who need to complete these tasks we call **Action Items**. Alternatively, you can also assign a set of Action Items which are grouped and called **Action Packs** to the **Student** that needs to complete these items. This feature works with our AccuCampus Student app and will keep them tracking their progress, earning badges for completing their tasks, accessing more features available to them such as the [Student Compass](#), and more!

In order to see the Action Plan for a user click on Action Plan-> All Plan:

Action Plans

A screenshot of the AccuCampus web interface showing the "Action Plans" section. It features a search bar with the text "Student" and a dropdown menu containing the name "JorgeAngel Rdguez". Below the search bar are three buttons: "Search" (blue), "Cancel" (light gray), and "Bulk Complete" (light gray).

Student

JorgeAngel Rdguez

Search Cancel Bulk Complete

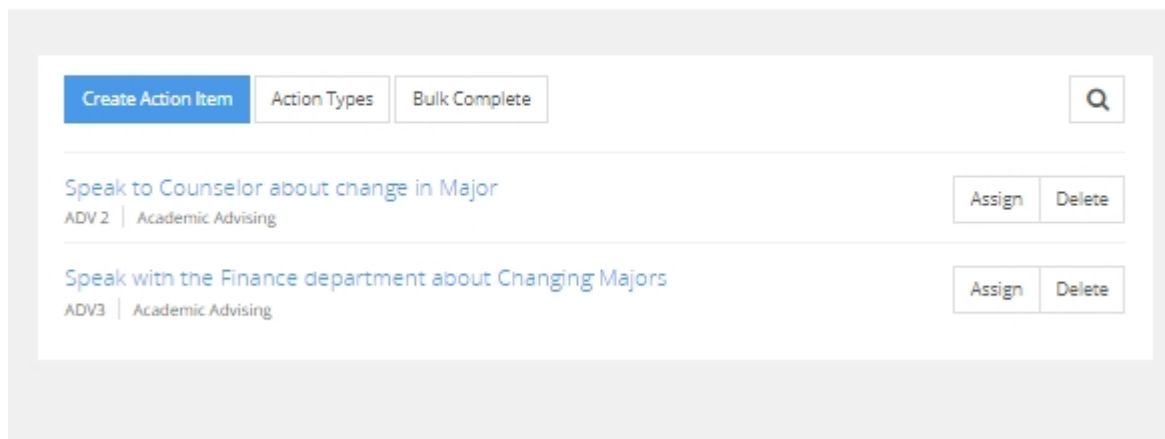
Action Items

How to Access: Action Plan -> Action Items

Purpose: [AccuCampus](#) uses **Action Items** for referrals and processes such as early alerts. It's a simple process for faculty or other staff members (or even students) to flag a user for a variety of reasons, and each step of the process is tracked in [AccuCampus](#). In many cases, alerts can be assigned or marked as completed automatically. Each Action Item can be hidden from inappropriate

parties, and only authorized users can view individual student plans. Used to view/manage the individual **Action Items** in AccuCampus. These **Action Items** can be grouped into **Action Packs** or they can be assigned directly to an **Action Plan** for a **Student**.

Action Items



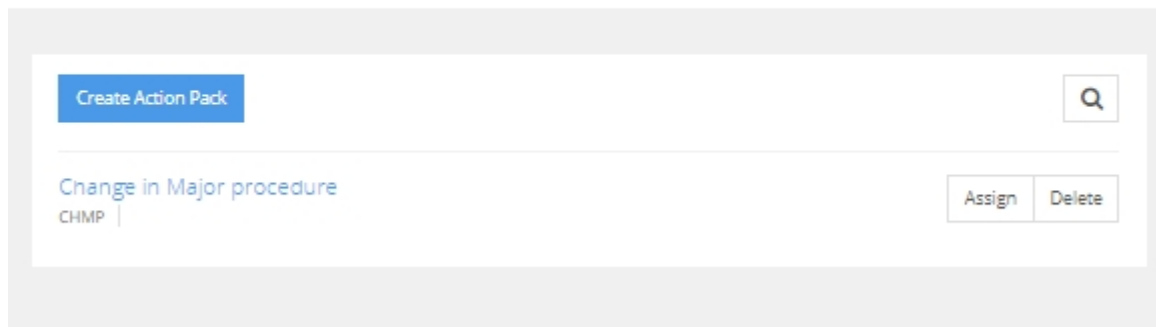
In order to add a new "Action Item" click on "Create", after entering the basic information about the "Action item", you can also restrict access to it.

Action Packs

How to Access: Action Plan > Action Packs

Purpose: Within [AccuCampus](#), individual **Action Items** can be combined into an **Action Pack**. Use this option to set up a series of steps that will be automatically assigned to a user one by one as each step is completed. Examples of this would be an **Action Pack** related to incoming Freshmen who must: 1-complete a form, 2-attend orientation, and 3-arrange housing, before starting school. Before creating an **Action Pack**, you will need to have created **Action Items**. Used to view/manage the **Action Packs** that consist of **Action Items** that need to be completed by **Students** in AccuCampus. Here you can add/remove **Action Items** to/from an **Action Pack**.

Action Packs



Creating a Referral

Go to Action Plan-> Action Items:

Click "Create Action Items":

From the previous screen, this is what loads and options you have when you click the **Create Action Item** button.

Create New Action Assignment

Action Item

Action Item

Select one...

General Info

Assign to ☒ Student ☐ Members of Group

Student

Fred Flinstone

Due On

Expire On

☐ Autocomplete based on rules

☐ Completed

Notes

Assignment Notes

☐ Public for student

Followers

Other

Type to search...



Add

Save

Cancel

General Info

- **Code** - This is a unique code for this **Action Item** which can be used when pulling reports to show the completion of the specific **Action Item**.
- **Name** - This is what is displayed to the Student and is the title or name of the **Action Item**.
- **Description** - This is an optional field used to help provide more information that may help a user decide whether or not to assign this particular **Action Item** to a **Student**.
- **Action Type** - This is a list of existing **Action Types** that have been created to allow you to categorize the **Action Items** but if you do not have any you can save the **Action Item** for now, create an **Action Type** (shown below), and update this information on the **Action Item** later.
- **Duration** - This is the estimated duration the appointment/session should last to complete this **Action Item**.

Service and Course

- **Service** - This is where you can associate **Services** with a particular **Action Item**.
- **Event-related** - This is if you want to see available **Seminars** or **Courses** as options in the above list as well.

Followers

- **Users** - This option is used to assign particular **Users** which needs to be notified about this. They will receive e-mail updates when there are changes made to this **Action Item** such as being assigned, removed, or updated.

Visibility

- **Public for student** - Enabling this option allows for **Students** to be able to assign this **Action Item** to themselves.

Entering Follow ups

For **Action Items** tutors can write notes/follow-ups to tell how the student is doing, see this short video as an example on how to type multiple follow-ups comments:

MyPlan Follow-up

Action Item

Type	Academic Advising
Code	COACH101
Name	01 - Schedule an appointment with your academic success coach
Description	It looks like we might need to connect. Please schedule an appointment with your coach for this week.

General Info

Student	JorgeAngel Rdguez
Assigned On	Mon, Dec 14, 2020 4:37 PM
Assigned By	Jorge2 rodriguez
MyPlan Notes	
Due On	<input type="text" value="12/14/2020"/> <input type="text" value="5:07pm"/>
Expire On	<input type="text" value="12/28/2020"/> <input type="text" value="4:37pm"/>

Updates

Jorge2 rodriguez the student is doing great
(Public for student)
11 minutes ago

Jorge2 rodriguez this is another note
(Public for student)
10 minutes ago

Closing a Referral

In order to close a referral, the “Action Item” status must change as “completed”, either automatically using rules or manually.

Watch this short video on how the process works:

Engineerica College

Search for anything in the system...

AccuCampus was updated! You're now using version 2.7.0.0 that was released 5 days ago! To view the change log click [here](#).

News!

AccuCampus

AccuCampus is designed with you and your students in mind. We know how valuable your student's success is to your institution. With AccuCampus you get all the tools you need to increase your student engagement and their academic success

Get in line remotely. Avoid waiting. [Learn more](#)

latest news

Some say distance and differences in how their peers handle the pandemic have changed their relationships -- and not for the better

3 hours ago Abby Mahler ended a childhood friendship in the comments of one of her Instagram posts.

Fauci still plans to get Covid-19 vaccine in the next few days

2020 years ago Covid vaccines will make little impact on the devastating winter ahead

Upcoming Courses (students)

- No upcoming courses in the next days.

Viewing Referrals Reports

Go to General-> Individual Action-plan by User:

Select filters as needed and run the report.

Report filtered by

Date range: Everything

Donald Duck (#12/31/5551 7:00 PM - DUCK@gmail.com)

Assigned On	Assigned By	Due on	Code	Name	Completion Date	C
05/06/2020 11:38 AM	Jorge Rodriguez	05/06/2020 12:08 PM	ADV 2	Speak to Counselor about change in Major		1,
05/06/2020 11:38 AM	Jorge Rodriguez	05/06/2020 12:08 PM	ADV3	Speak with the Finance department about Changing Majors		1,
05/21/2020 11:14 AM	Jorge Rodriguez	05/21/2020 11:44 AM	ADV3	Speak with the Finance department about Changing Majors		1,
12/10/2020 11:41 AM	Jorge Rodriguez	12/10/2020 12:41 PM	Center1	Visit Center		1,
12/15/2020 2:03 PM	Jorge Rodriguez	12/15/2020 2:33 PM	ADV 2	Speak to Counselor about change in Major	12/15/2020 2:05 PM	1,

Fred Flinstone (#12/31/5550 7:00 PM - fred@accucampus.edu)

Assigned On	Assigned By	Due on	Code	Name	Completion Date	C
05/21/2020 11:13 AM	Jorge Rodriguez	05/21/2020 11:43 AM	ADV 2	Speak to Counselor about change in Major		0,
05/21/2020 11:15 AM	Jorge Rodriguez	05/21/2020 11:45 AM	ADV3	Speak with the Finance department about Changing Majors		0,

Previous: [Tracking Classroom Attendance](#) | [Back to Guide](#)

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<http://attendance-tracking.com/docs/> - **Engineerica Documentation**

Permanent link:
<http://attendance-tracking.com/docs/doku.php/accucampus/administrator/quickstart/action-plans>

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