

## SSP v2.3 and Later Configuration Guide

This guide will help you prepare to configure and manage SSP. It is intended to identify information that will be useful during the installation and configuration of the SSP software.

### Installation Settings

The following configuration options are defined during the installation. The configuration must be completed by a technical resource that has permissions to update the SSP database and configuration files. Each should be considered and select prior to installation or during Discovery Services.

1.1 Student ID Alias (updated in v2.5)																	
Definition	The alias for the student identifier that appears throughout the application. The Student ID along with the student name identifies students through SSP																
Configuration	v2.3 and 2.4: Minor view configuration in the javascript source. Must be performed by a developer to change src/main/webapp/app/model/Configuration.js  v2.5: Located in the Administration Menu, System Configuration Tab, Configuration Options Item																
Names	<table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%;">Name</th> <th style="width: 50%;">Default</th> </tr> </thead> <tbody> <tr> <td>studentIdAlias</td> <td>Student ID</td> </tr> <tr> <td>studentIdMinValidationLength</td> <td>3</td> </tr> <tr> <td>studentIdMinValidationErrorText</td> <td>The entered value is not long enough</td> </tr> <tr> <td>studentIdMaxValidationLength</td> <td>8</td> </tr> <tr> <td>studentMaxValidationErrorText</td> <td>The enter value is too long</td> </tr> <tr> <td>studentIdAllowableCharacters</td> <td>a-zA-Z0-9</td> </tr> <tr> <td>studentIdValidationErrorText</td> <td>Not a valid Student Id</td> </tr> </tbody> </table>	Name	Default	studentIdAlias	Student ID	studentIdMinValidationLength	3	studentIdMinValidationErrorText	The entered value is not long enough	studentIdMaxValidationLength	8	studentMaxValidationErrorText	The enter value is too long	studentIdAllowableCharacters	a-zA-Z0-9	studentIdValidationErrorText	Not a valid Student Id
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	studentMaxValidationErrorText	The enter value is too long															
	studentIdAllowableCharacters	a-zA-Z0-9															
studentIdValidationErrorText	Not a valid Student Id																

Values					
<b>1.2 Coach Label</b>					
Definition	The label for the Case Manager that appears throughout the application. The Case Manager label precedes the name of the individual to whom the student is assigned.				
Configuration	v2.3 and 2.4: Minor view configuration in the javascript source. Must be performed by a developer to change src/main/webapp/app/model/Configuration.js v2.5: Located in the Administration Menu, System Configuration Tab, Configuration Options Item				
Parameters	<table border="1"> <thead> <tr> <th>Name</th> <th>Default</th> </tr> </thead> <tbody> <tr> <td>coachFieldLabel</td> <td>Coach</td> </tr> </tbody> </table>	Name	Default	coachFieldLabel	Coach
Name	Default				
coachFieldLabel	Coach				
Values					
<b>1.3 Retrieval of External Data in Caseload Assignment</b>					
Definition	Set this option to true to display the retrieveFromExternalDataButton on the Caseload Assignment Screen when adding a new record. This will allow you to populate a student's record from the external_data source while adding a new record to the system.				
Configuration	v2.3 and 2.4: Minor view configuration in the javascript source. Must be performed by a developer to change src/main/webapp/app/model/Configuration.js v2.5: Located in the Administration Menu, System Configuration Tab, Configuration Options Item				
Parameters	<table border="1"> <thead> <tr> <th>Name</th> <th>Default</th> </tr> </thead> <tbody> <tr> <td>allowExternalRetrievalOfStudentDataFromCaseloadAssignment</td> <td>true</td> </tr> </tbody> </table>	Name	Default	allowExternalRetrievalOfStudentDataFromCaseloadAssignment	true
Name	Default				
allowExternalRetrievalOfStudentDataFromCaseloadAssignment	true				
Values					
<b>1.4 UP Coach Query</b>					

Definition	uPortal user lookup criteria by attribute name/value pairs. (Currently these are anded.) Should be well-formed JSON that will parse to a Java Map<String,String>.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = up_coach_query
Default	{"SSP_ROLES": "SSP_COACH"}
Values	
<b>1.5 Coach Set from External Data</b>	
Definition	Coach is always set from external data if this is set to true.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = coachSetFromExternalData
Default	TRUE
Values	
<b>1.6 Coach Unset From External Data</b>	
Definition	All coach assignments to be deleted based on external data, overwriting any local changes or externally assigned coach.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = coachUnsetFromExternalData
Default	FALSE
Values	
<b>1.7 Student Type Set from External Data</b>	
Definition	Student type is always set from external data if this is set to true.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration

	Options Item Name = studentTypeSetFromExternalData
Default	False
Values	
<b>1.8 Student Type Unset from External Data</b>	
Definition	All student type assignments to be deleted based on external data, overwriting any local changes or externally assigned student types.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = studentTypeUnsetFromExternalData
Default	False
Values	
<b>1.9 Task External Person Sync Batch Size</b>	
Definition	Maximum number of person records to sync from the external person table in a single transaction. Negative values treated as unlimited. A zero (0) will be treated the same way as the web APIs, 100 for 2.0
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = task_external_person_sync_batch_size
Default	100
Values	
<b>1.10 Task External Person Sync Max Batches Per Exec</b>	
Definition	Maximum number of transactions per execution of the external person sync task. Negative values treated as unlimited. A zero (0) will disable the task and negative one (-1) will allow unlimited.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration

	Options Item Name = task_external_person_sync_max_batches_per_exec
Default	-1
Values	
<b>1.11 Task External Person Sync Trigger</b>	
Definition	"Frequency with which the person and external person tables will be synchronized. This is resource intensive, so should be run during off hours. Specify a number to run the sync every x-many milliseconds. Or specify two numbers separated by a slash (60000/1000) to represent both a period and an initial offset. Or specify a cron expression.  See <a href="http://www.manpagez.com/man/5/crontab/">http://www.manpagez.com/man/5/crontab/</a> for cron expression syntax. Default value means 'daily at 1AM, server-local time.'"
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = task_external_person_sync_trigger
Default	0 0 1 * * *
<b>1.12 Task Scheduler Config Poll Trigger</b>	
Definition	Frequency with which execution schedules for background tasks will be checked for new configuration. Specify a number to run the sync every x-many milliseconds. Or specify two numbers separated by a slash (60000/1000) to represent both a period and an initial offset. Or specify a cron expression.  See <a href="http://www.manpagez.com/man/5/crontab/">http://www.manpagez.com/man/5/crontab/</a> for cron expression syntax. Default value means 'every 15 minutes after an initial offset of 5 minutes.'
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = task_scheduler_config_poll_trigger
Default	"900000/300000"
Values	

### 1.13 Send Mail (updated in v2.5)

**Definition** Indicator for the system to send mail notifications. If false, the application will generate entries in the system log. For a true value, the default email message uses the primary\_email\_address for the person record with name = System Administrator.

**Configuration** Located in the Administration Menu, System Configuration Tab, Configuration Options Item: Name = send\_mail  
Located in the database for a specific record in person where first name = System and last name = Administrator.

Name	Type	Default
send_mail	string	false
Email address	string	test@sinclair.edu

**Example** True, sspadmin@college.edu

**Values**

### 1.14 Test Mail Server Port

**Definition** The port to start the mock mail server on in the test environment

**Configuration** Located in the Administration Menu, System Configuration Tab, Configuration Options Item  
Name = test\_env\_mock\_mail\_server\_port

**Default** 40025

**Values**

### 1.15 BCC Email Address

**Definition** The email address to blind carbon copy on every message

**Configuration** Located in the Administration Menu, System Configuration Tab, Configuration Options Item

	Name = bcc_email_address
Default	noone@test.com
Values	
<b>1.16 Manage Integration Database</b>	
Definition	Whether the system should manage the integration database. If true the tables and views will be manipulated automatically as the application evolves (tables added/modified/dropped, views added/modified/dropped). If false, the administrator must follow and apply the changes.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = manage_integration_database
Default	TRUE
Values	
<b>1.17 Status Code Mapping</b>	
Definition	Students enrolled in a course that appears in the roster for Early Alerts and Schedule Tab of the Main Tool optionally have a code indicating the status. The code indicates the status of enrollment. The configuration option translates the code into a friendly term for displaying in the roster. Multiple values can be defined, and the definitions must be in valid JSON form
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = status_code_mappings
Default	{"default": "Enrolled"}
Examples	W = Withdrawn, E = Enrolled, DR = Dropped
Values	
<b>1.18 Highly Trusted IPs Enabled</b>	
Definition	Boolean value indicating whether or not to consider highly_trusted_ips

Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = highly_trusted_ips_enabled</p>	
Default	false	
Values		
<b>1.19 Client-side timeout value</b>		
Definition	<p>SSP will automatically dismiss the user interface after a prolonged period of inactivity. When the timeout value is reached, SSP will redirect the user to the login screen so that on screen data is no longer visible. The value is defined as minutes of inactivity.</p>	
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = client_timeout</p>	
Default	20	
Values		
<b>1.20 Smarter Measure Integration</b>		
Definition	<p>SSP will integrate with Smarter Measure to display full test results in the Main Tool – Placement tab for test data available through REST APIs provided by Smarter Measure. In addition to the configurations below, the external_student_test data should match the reserved test code pairs below in order for SSP to create the link.</p>	
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p>	
Parameters	Name	Description
	smarter_measure_base_url	Base url for REST interaction with smarter measure
	smarter_measure_username	Username to for basic authentication smarter measure



	smarter_measure_password	password to for basic authentication smarter measure
	smarter_measure_reserved_test_code_pairs	list of testcode,subtestcode pairs that come from smarter measure
	smarter_measure_group_key	list of smarter measures group key designation for school

### 1.21 Outbound Email Address (added in v2.5.1)

**Definition**

SSP sends all messages to students and users from the same email address. Depending on the type of message, the from address will be formatted as the system administrator (system messages) or initiating user (user messages).  
Examples:

SSP Administrator <[ssp@institution.edu](mailto:ssp@institution.edu)>  
Coach Brown (SSP) <[ssp@institution.edu](mailto:ssp@institution.edu)>

In the example above, SSP is based on the configured Institution Name.

**Configuration**

Located in the Administration Menu, System Configuration Tab, Configuration Options Item

Name = outbound\_email\_address

**Example**

ssp@institution.edu

**Value**

### 1.22 Task Directory Person Refresh Trigger (added in v2.5,1)

**Definition**

Frequency directory person table is refreshed from its mirror view. This task runs automatically after the person sync task and does not need to run independently. Therefore, the default value has been set to 'disabled'. To run directory person refresh independently change the value to a valid cron expression. See <http://www.manpagez.com/man/5/crontab/> for cron expression syntax.

**Configuration**

Located in the Administration Menu, System Configuration Tab, Configuration Options Item

Name = task\_directory\_person\_refresh\_trigger

Default	disabled
Value	
<b>1.23 LTI OAuth Timestamp Expiry Seconds (added in v2.5.2)</b>	
Definition	LTI OAuth Timestamp Expiry Config: Sets the global policy in seconds for OAuth timestamp freshness, which also effectively bounds the amount of time persistent nonce's need to be stored in the database. The default value of 5400 (90m) follows the recommendation of the LTI spec.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = lti_oauth_timestamp_expiry_seconds
Default	5400
Values	
<b>1.24 Mail Age in Days Limit (added in v2.6.0)</b>	
Definition	Message Age for Pruning Config: The background job the prunes the message table uses this config to decide which messages will get archived. Anything older in days than this config gets moved to the archive table.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = "mail_age_in_days_limit"
Default	2
Values	
<b>1.25 Mail Bulk Message Batch Size (added in v2.6.0)</b>	
Definition	Bulk Email Job Config: Controls how many emails will be created and queued at once. The number should be relatively small to avoid holding transactions open for a very long time and to limit the impact long running tasks.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item

	Name = mail_bulk_message_batch_size
Default	25
Values	
<b>1.26 Mail Bulk Message Fail on Dead Letter Queue (dlq) Overflow (added in v2.6.0)</b>	
Definition	Bulk Email Job Config: Controls whether exceeding mail_bulk_message_max_dlq_size will fail a bulk email messaging job at whatever time that occurs. Default is 'false' which allows the job to proceed, silently skipping any messages that fail and cannot be added to the dead letter queue.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = mail_bulk_message_fail_on_dlq_overflow
Default	false
Values	
<b>1.27 Mail Bulk Message Limit (added in v2.6.0)</b>	
Definition	Bulk Email Job Config: Set a limit on the total number of messages an end user can create via 'bulk action'. Use '-1' for 'no limit'.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = mail_bulk_message_limit
Default	500
Values	
<b>1.28 Mail Bulk Message Max Dead Letter Queue (dlq) Size (added in v2.6.0)</b>	
Definition	Bulk Email Job Config: Sets a limit on the total number of messages that will be tracked by the dead letter queue for post-job execution analysis. Very large values run the risk of requiring large memory and data storage footprints.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item

	Name = mail_bulk_message_max_dlq_size
Default	100
Values	
<b>1.29 Mail Delivery Retry Limit (added in v2.6.0)</b>	
Definition	Message queue retry Config: Drives how many times the message queue tries to send a message before it gives up
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = mail_delivery_retry_limit
Default	3
Values	
<b>1.30 Task Bulk Job Queue Trigger (added in v2.6.0)</b>	
Definition	Bulk Job Queue Config: Drives the frequency of the cron job that executes bulk actions. Default is 'Every 5s, with a 30s initial delay'
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = task_bulk_job_queue_trigger
Default	5000/30000
Values	
<b>1.31 Task Message Queue Pruning Trigger (added in v2.6.0)</b>	
Definition	Message Queue pruning Config: Drives the frequency of the cron job that prunes and archives the message table
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = task_message_queue_pruning_trigger

Default	0 0 22 * * *
Values	
<b>1.32 Program Status Bulk Change Batch Size (added in v2.6.0)</b>	
Definition	Program Status Job Config: Controls how many program status change requests will be created and queued at once. The number should be relatively small to avoid holding transactions open for a very long time and to limit the impact long running tasks.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = program_status_bulk_change_batch_size
Default	25
Values	
<b>1.33 Program Status Bulk Change Max Dead Letter Queue (dlq) Size (added in v2.6.0)</b>	
Definition	Program Status Job Config: Sets a limit on the total number of program status change requests that will be tracked by the dead letter queue for post-job execution analysis. Very large values run the risk of requiring large memory and data storage footprints.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = program_staus_bulk_change_max_dlq_size
Default	100
Values	
<b>1.34 Program Status Bulk Change Fail on Dead Letter Queue (dlq) Overflow (added in v2.6.0)</b>	
Definition	Program Status Job Config: Controls whether exceeding program_status_bulk_change_max_dlq_size will fail a bulk program status change job at whatever time that occurs. Default is 'false' which allows the job to proceed, silently skipping any requests that fail and cannot be added to the dead letter queue.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration

	Options Item Name = program_staus_bulk_change_fail_on_dlq_overflow
Default	False
Values	
<b>1.35 Watch Bulk Change Batch Size (added in v2.6.0)</b>	
Definition	Watch Change Job Config: Controls how many watch/unwatch requests will be created and queued at once. The number should be relatively small to avoid holding transactions open for a very long time and to limit the impact long running tasks.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name =
Default	25
Values	
<b>1.36 Watch Bulk Change Max Dead Letter Queue (dlq) Size (added in v2.6.0)</b>	
Definition	Watch Change Job Config: Sets a limit on the total number of watch/unwatch requests that will be tracked by the dead letter queue for post-job execution analysis. Very large values run the risk of requiring large memory and data storage footprints.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = watch_bulk_change_max_dlq_size
Default	100
Values	
<b>1.37 Watch Bulk Change Fail on Dead Letter Queue (dlq) Overflow (added in v2.6.0)</b>	
Definition	Watch Change Job Config: Controls whether exceeding watch_bulk_change_max_dlq_size will fail a bulk watch request job at whatever time that occurs. Default is 'false' which allows the job to proceed, silently skipping any

	messages that fail and cannot be added to the dead letter queue.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = watch_bulk_change_fail_on_dlq_overflow
Default	F
Values	
<b>1.38 Phone Display Order (added in v2.7.0)</b>	
Definition	This Configuration Options specifies which order the application should search through phone numbers for a non-null/blank value to display. In the event the application has a UI field for only one number to display, it will display the first non-blank value in that list with a proper label of which phone number it is. If the application displays all numbers, it will attempt to display all non-blank values in the order of that list from left to right. Currently this configuration only affects the phone number display in Main Dashboard and Coach History and General Student reports.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = phone_display_order
Default	home,cell,alternate,work
Values	
<b>1.39 My Caseload Person Table Type (added in v2.7.0)</b>	
Definition	Use this to set the types of students display in My Caseload view. Allowed values: SSP_ONLY, ANYWHERE or EXTERNAL_DATA_ONLY
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = my_caseload_person_table_type
Default	ANYWHERE
Values	

<b>Sync Student Data with External Database- Removed in v2.0.0</b>	
Explanation	This configuration setting was removed based on application changes made per <a href="#">SSP-1630</a> and <a href="#">SSP-1631</a>



## General Settings

These settings are needed for the operation of SSP and should be reviewed and considered. Each should be considered and select during installation or during Discovery Services.

### 2.1 Student Types

Definition	Student types define the major classification for a student in the SSP tool-set. Most commonly, the Student Type defines the current standing of the student. Students can only be assigned one Student Type. The Student Type can be changed, but no history of Student Type assignments are stored in the database.	
Appears	Student Record, Appointment Information	
Configuration	Located in the Administration Menu, Caseload Assignment Tab	
Parameters	Field	Definition
	Student Type	Label for the Student Type options
	Description	Description of purpose and characteristics of the Student Type
	Require Initial Appointment	For students assigned to the Student Type, an initial appointment will be required with the Case Manager
	Code	The code defined for the student type in the SIS
Required	EAL= Early Alert	
Default	EAL = Early Alert, ILP = Individualized Learning Program, CAP = Counseling Action Plan	
Example(s)	TR = Transfer, FTIC = First-Time, AD = Adult, HS = High School	
Values		

### 2.2 Special Service Groups

Definition	This tool allows for the capture of data about who the students are and what demographic groups or organizational classifications apply. The values are non-exclusive, and many can be selected at the same time on a student record. Special Service Groups are important to track students in multiple groups and extremely
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	valuable in reporting.	
Appears	Student Record, Caseload Assignment Reporting	
Configuration	Located in the Administration Menu, Caseload Assignment Tab	
Parameters	Field	Definition
	Special Service Group	Label for the Special Service Group
	Description	Description of purpose and characteristics of the group
	Special Service Group	Indicates that the entry is a Special Service
Default	None	
Example(s)	African American Male Initiative, Displaced Worker, Baseball Player, Specific Scholarship	
Values		
<b>2.3 Reasons for Service</b>		
Definition	This tool allows for the capture of data about why students are receiving services. The values are non-exclusive and many can be selected at the same time on a student record.	
Appears	Student Record, Caseload Assignment	
Configuration	Located in the Administration Menu, Caseload Assignment Tab	
Parameters	Field	Definition
	Reason for Service	Label for the Reason For Service
	Description	Description of purpose and characteristics of the Reason For Service
Default	None	

Example(s)	Low test scores, High school program, Developmental education class, Disability services, Early alert class, Distance Learning Student
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Values	
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### 2.4 Referral Sources

Definition	This tool allows for the capture of data about how students were referred to receive services. The values are non-exclusive and many can be selected at the same time on a student record.
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Appears	Student Record, Caseload Assignment
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Configuration	Located in the Administration Menu, Caseload Assignment Tab
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Parameters	Field	Definition
	Referral Source	Label for the Referral Source
	Description	Description of purpose and characteristics of the Referral Source

Example(s)	Admissions, Testing Center, Judicial Affairs, Campus Police, Scholarship Office
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Values	
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### 2.5 Program Status Change Reasons

Definition	This tool allows for the capture of data about the reason a Program Status changes in SSP. Frequently, the case manager is the closest person to the student and may know why the student has changed status. The change reasons are important for analysis and review.
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Appears	Student Record
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Configuration	Located in the Administration Menu, Caseload Tab
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Parameters	Field	Definition
	Program Status Reason	Label for the Program Status Reason
	Description	Description of purpose and characteristics of the Program

		Status Reason
Default	Childcare issues, Death, Employment interferes with school, Financially unable to pay for tuition, Financially unable to purchase books, Medical issues, Military Services, Moving, Personal Issues, Poor academic performance (Dropout), Services not needed, Transferred to another school, Transportation issues, Unknown/unable to contact	
Example(s)	Childcare Issues, Military Service, Moving, Suspended from Financial Aid	
Values		
<b>2.6 Program Status</b>		
Definition	This indicates the status of a student's current participation in SSP. These values should not be changed unless full customization of the system is desired. There are business rules in SSP that use these status indicators and as such changing them may cause business rules to stop working correctly.	
Appears	Student Record	
Configuration	Located in the Administration Menu, Caseload Tab	
Default	Active, Inactive, Non-Participating, Transitioned, No-Show	
	Strongly recommend the default values are NOT changed. Changes will affect the business logic in SSP.	
Values		
<b>2.7 Confidentiality Levels</b>		
Definition	SSP has default Confidentiality Levels but additional items can be configured and used throughout SSP. If additional (or different) levels are required, new Confidentiality Levels can be defined in SSP admin. The configurable Levels work exactly the same and require assignment to users in order for SSP to properly enforce the restrictions, just as the default Levels do. There is a limit of 20 customized levels. The new levels will be used by name in the application and associate to a generic permission in the application.	
Appears	Throughout SSP	
Configuration	Located in the Administration Menu, Security folder	

Parameters	Field	Definition
	Name	Name of the Confidentiality Level
	Description	A description of the Confidentiality Level
	Acronym	An acronym to define the Confidentiality Level
	Data Permission	Any available generic permission for Confidentiality Levels
Data Permissions	DATA_CL_01 through DATA_CL_20	
Defaults	Academic Resource Center, counseling Services, Disability, Displayed Workers, Early Alert, English as a Second Language, Everyone, Fast Forward, Individualized learning Plan, Manager, Staff	
Example(s)	Athletics, Athlete Information, DATA_CL_01 Judicial Affairs, Judicial Actions, DATA_CL_02	
Value(s)		
<b>2.8 Financial Aid Files (added in v2.3)</b>		
Definition	SSP will display an overall status of the financial aid application with a list of files required for the financial aid application. Each required file should be defined so that the individual file statuses can be displayed to users. The file codes will match data for each student in the external_student_financial_aid_file database table.	
Appears	Main Tool	
Configuration	Located in the Administration Menu, Main Tool folder	
Parameters	Field	Definition
	Name	Name of the financial aid file
	Description	The description of the financial aid file
	Code	The code of the required file
Example(s)	Residency Status, Proof of Residence, RES	

	Income Verification, Proof of Income, INCVER	
Value(s)		
<b>2.9 SAP Statuses (added in v2.3)</b>		
Definition	SSP will display an overall SAP status for each student. Each SAP status codes should be defined so that the individual SAP statuses can be displayed to users. The SAP status codes will match data for each student in the external_student_financial_aid database table.	
Appears	Main Tool	
Configuration	Located in the Administration Menu, Main Tool folder	
Parameters	Field	Definition
	Name	Name of the SAP Status Code
	Description	The description of the SAP status code
	SAP Code	The code representing the SAP status
Example(s)	Special Circumstance, Special circumstances exist, SPC Probation, Student on Probation, PROB	
Value(s)		

## Student Intake Settings

The Student Intake use is not required for SSP system but adds great value for data collection during coaching and counseling.

### 3.1 Child Care Arrangements

Definition	List all of the Child Care Arrangement options to appear on the Student Intake form.						
Appears	Student Intake Form, Demographics tab (displayed if Childcare needed = yes)						
Configuration	Located in the Administration Group, Student Intake Subgroup						
Parameters	<table border="1"><tr><td>Field</td><td>Definition</td></tr><tr><td>Name</td><td>Label for the Child Care Arrangement options</td></tr><tr><td>Description</td><td>Description of purpose and characteristics of the Child Care Arrangement options</td></tr></table>	Field	Definition	Name	Label for the Child Care Arrangement options	Description	Description of purpose and characteristics of the Child Care Arrangement options
	Field	Definition					
	Name	Label for the Child Care Arrangement options					
Description	Description of purpose and characteristics of the Child Care Arrangement options						
Default	Day Care, Family/Friend, Home Provider, Need to make arrangements						
Example(s)	Family Member, Daycare, Home Provider, School						
Values							

### 3.2 Citizenships

Definition	List all of the Citizenship options to appear on the Student Intake form.				
Appears	Student Intake Form, Demographics tab				
Configuration	Located in the Administration Group, Student Intake Subgroup				
Parameters	<table border="1"><tr><td>Field</td><td>Definition</td></tr><tr><td>Name</td><td>Label for the Citizenships options</td></tr></table>	Field	Definition	Name	Label for the Citizenships options
	Field	Definition			
Name	Label for the Citizenships options				

	Description	Description of purpose and characteristics of the Citizenships options
Default	International, Naturalized Citizen, Permanent Resident, US Citizen	
Example(s)	US Citizens, Naturalized Citizen, International	
Values		
<b>3.3 Confidentiality Disclosure Agreement</b>		
Definition	The specific legal text is defined to inform that student about what he/she is agreeing, how student data is managed in SSP and how data is used in the case management process.	
Appears	Student Intake, View Confidentiality Agreement	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Confidentiality Disclosure Agreement
	Description	Text of the agreement
Default	None	
Example(s)	The counseling services provided within the programs and departments of Student Success Services are designed to identify and address challenges that may impact the student's ability to successfully progress within the Example Community College setting. These services are not designed to take the place of more intense or comprehensive counseling and psychological services that are provided in the community at large. Counseling services may include but are not limited to:	
Values		
<b>3.4 Weekly Course Work Hour Ranges</b>		



Definition	List of hour ranges to identify student intent to spent time outside of class.												
Appears	Student Intake, EduGoal tab												
Configuration	Located in the Administration Group, Student Intake Subgroup												
Parameters	<table border="1"> <thead> <tr> <th>Field</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Label for the Course Work Outside of Class</td> </tr> <tr> <td>Description</td> <td>Description of purpose and characteristics of the Course Work Outside of Class options</td> </tr> <tr> <td>Range Start</td> <td>Low value for the range</td> </tr> <tr> <td>Range End</td> <td>High value for the range</td> </tr> <tr> <td>Range Label</td> <td>Value to display in the drop-down</td> </tr> </tbody> </table>	Field	Definition	Name	Label for the Course Work Outside of Class	Description	Description of purpose and characteristics of the Course Work Outside of Class options	Range Start	Low value for the range	Range End	High value for the range	Range Label	Value to display in the drop-down
	Field	Definition											
	Name	Label for the Course Work Outside of Class											
	Description	Description of purpose and characteristics of the Course Work Outside of Class options											
	Range Start	Low value for the range											
	Range End	High value for the range											
Range Label	Value to display in the drop-down												
Default	<p>LTPT, Light Load, 0, 5, "0-5"</p> <p>Moderate, Moderate Load, 6, 10, "6-10"</p> <p>LTFT, Light Load Full Time, 11, 15, "11-15"</p> <p>STFT, Standard Load Full Time, 16, 20 "16-20"</p> <p>HVFT, Heavy Load Full Time, 21, 1000, "More Than 20"</p>												
Example(s)	Moderate, Moderate Load, 6, 10, "6-10"												
Values													
<b>3.5 Education Goals</b>													
Definition	List all of the Education Goals options to appear on the Student Intake form.												
Appears	Student Intake, EduGoal tab												

Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Education Goals
	Description	Description of purpose and characteristics of the Education Goals
Required Items	Bachelor, Military, Other	
Default	Associates Degree, Bachelor, Certificate, Military, Other, Short Term Certificate, Tech School, Uncertain, Workforce	
Example(s)	Associate Degree, Bachelors Degree, Certificate	
Values		
<b>3.6 Education Levels</b>		
Definition	List all of the completed Education Levels options to appear on the Student Intake form.	
Appears	Student Intake, EduLevels tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Subgroup
	Description	Description of purpose and characteristics of the Subgroup
Required Items (can be renamed to similar)	Other, GED, High School Graduation, No Diploma/No GED, Some College Credit	
Default	Attending High School, College Degree – 2 yr, College Degree – 4yr, GED, High School Graduation, No Diploma/No GED, Other, Some College Credits	

Example(s)	GED, Attending High School, Some College Credits, College Graduate	
Values		
<b>3.7 Ethnicities</b>		
Definition	This tool defines the available Ethnicity options in the Student Intake tool.	
Appears	Student Intake, Demographics	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Fields	Definition
	Name	Label for the Ethnicity type
	Description	Description of purpose and characteristics of the Ethnicity options
Default	African American/Black, American Indian/Alaskan Native, Asian Pacific Islander, Caucasian/White, Hispanic/Latino, Other, Prefer Not To Answer	
Example(s)	Caucasian, Asian, Hispanic, non-Latino	
Values		
<b>3.8 Funding Sources</b>		
Definition	List all of the Funding Source options to appear on the Student Intake form.	
Appears	Student Intake, Funding tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Funding Source

	Description	Description of purpose and characteristics of the Funding Source options
Required Items	Other	
Default	Assistance Needed, Employer, Federal Pell Grant, Financial Aid, GI Bill, Military Tuition Assistance, Other, Parent/Other Relative, Scholarship, Self, Spousal Assistance, Student Loan, Trade Adjustment Act (TAA), Workforce Investment Act	
Example(s)	Assistance Needed, Employer, Financial Aid, Student Loan	
Values		
<b>3.9 Marital Statuses</b>		
Definition	List all of the Marital Status options to appear on the Student Intake form.	
Appears	Student Intake Form, Demographics tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Marital Status Arrangement options
	Description	Description of purpose and characteristics of the Marital Status options
Default	Divorced, Married, Separated, Single, Widowed	
Example(s)	Married, Single, Divorced	
Values		
<b>3.10 Military Affiliations</b>		
Definition	List all of the Military Affiliations options to appear on the Student Intake form.	

Appears	Student Intake, Demographics tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Military Affiliations
	Description	Description of purpose and characteristics of the Military Affiliations options
Default	Active Duty, Dependent, DOD Civilian, Reservist, Veteran	
Example(s)	Active Duty, Dependent, DOD Civilian, Reservist, Veteran	
Values		

### 3.11 Races

Definition	List all of the Races options to appear on the Student Intake form.	
Appears	Student Intake, Demographics tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Races
	Description	Description of purpose and characteristics of the Races options
	Code	The Race code defined in the SIS
Default	HSP = Hispanic, WHT = White, OTH = Other	
Example(s)	HSP = Hispanic, WHT = White, OTH = Other	
Values		

**3.12 Registration Load Ranges**

Definition	List of registration load ranges to identify student intent for course load												
Appears	Student Intake, EduGoal tab												
Configuration	Located in the Administration Group, Student Intake Subgroup												
Parameters	<table border="1"> <thead> <tr> <th>Field</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Label for the Registration Load Ranges</td> </tr> <tr> <td>Description</td> <td>Description of purpose and characteristics of the Registration Load Range options</td> </tr> <tr> <td>Range Start</td> <td>Low value for the range</td> </tr> <tr> <td>Range End</td> <td>High value for the range</td> </tr> <tr> <td>Range Label</td> <td>Value to display in the drop-down</td> </tr> </tbody> </table>	Field	Definition	Name	Label for the Registration Load Ranges	Description	Description of purpose and characteristics of the Registration Load Range options	Range Start	Low value for the range	Range End	High value for the range	Range Label	Value to display in the drop-down
	Field	Definition											
	Name	Label for the Registration Load Ranges											
	Description	Description of purpose and characteristics of the Registration Load Range options											
	Range Start	Low value for the range											
	Range End	High value for the range											
Range Label	Value to display in the drop-down												
Default	LT, Light Part Time Schedule, 1, 6 “1-6” PT, Part-Time Schedule, 7, 12, “7-12” FT, Full Time Student, 13, 1000, “13 or more”												
Example(s)	PT, Part-Time Schedule, 7, 12, “7-12”												
Values													

**3.13 Student Statuses**

Definition	This represents a student's status at the institution defined at the time the student is created in SSP. Students can only be assigned one Student Status. The Student Status can be changed, but no history of Student Status assignments is stored in the database.
Appears	Student Intake, EduPlan tab

Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Student Status options
	Description	Description of purpose and characteristics of the Student Status types
Default	Current, Former, New, Pre-College/ESP, Transfer	
Examples	New, Current, Former, Transfer	
Values		
<b>3.14 Veteran Statuses</b>		
Definition	List all of the Veteran Status options to appear on the Student Intake form.	
Appears	Student Intake, Demographics tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition
	Name	Label for the Veteran Status
	Description	Description of purpose and characteristics of the Veteran Status options
Default	Not applicable, Dependent of Veteran, Montgomery County Active Duty, Montgomery County Reservist, VEAP, Veteran	
Example(s)	Dependent of veteran, Veteran, Vocation rehabilitation	
Values		
<b>3.15 Text labels for Intake tabs and fields (added in v2.3)</b>		
Definition	SSP v2.3 allows for a high level of control over the labels that	

	appear for tabs and fields in the Intake. Each of the tabs and fields is controlled by a customizable value in the database that will appear in the user interface. Defaults values are provided for each tab and field. Some of the customizable labels are global and affect more than the student intake. In general, the global fields represent synchronized data for students including names, addresses and contact information.	
Appears	Intake, Main Tool, Caseload Assignment, Email Student	
Configuration	Located in the Administration Menu, System Configuration, Text.	
Parameters	Field	Definition
	Name	Name of the tab or field based on the default values
	Value	The customized text, or default, to appear in the Intake
	Code	Represents a hierarchy of the display location as tool-tab-field
Global	Synchronized person fields with the code pattern = ssp.label.<field>	
Intake	All tabs and fields on the Intake with the code pattern = intake.<tab>.<field>	
Values	The configurations should be made in SSP instead of the Configuration Guide.	
<b>3.16 Completed Items (added in v2.3)</b>		
Definition	A checklist of 'to do' items .	
Appears	Student Intake, Completed Items tab	
Configuration	Located in the Administration Group, Student Intake Subgroup	
Parameters	Field	Definition



	Name	Label for the 'to do' item
	Description	Description of purpose and characteristics of the Completed Item options
Default	New Student Orientation, Register for Classes	
Example(s)	Apply for Financial Aid, Schedule appointment with advisor	
Values		

### 3.17 Student Intake Default Due Date Offset (added in v2.4)

Definition	The default number of days to add to the created date for the Student Intake request task. When the Student Intake task is created in Caseload Assignment the due date for the task will be created as 7 days after today by default.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item  Name = student_intake_default_due_date_offset
Default	7
Values	

### Student Intake Demographics Employment Shift **Removed in v2.3.0**

Definition	Removed in v2.3.0. The text label can be defined through the Text (label) configuration.
------------	--

### Education Plan Parent Degree Label **Removed in v2.3.0**

Definition	Removed in v2.3.0. The text label can be defined through the Text (label) configuration.
------------	--

### Education Plan Special Needs Label **Removed in v2.3.0**

Definition	Removed in v2.3.0. The text label can be defined through the Text (label) configuration.
------------	--

## Early Alert Settings

Early Alert is the process and tool for faculty to notify Case Manager about a potential issue with a student. The process includes feedback from Case Manager to faculty. This section configures the Early Alert (EAL) interface for Faculty/Staff and Case Managers to use during the EAL process.

### 4.1 Campuses

Definition	<p>SSP can segment permissions and access by campus. If necessary to separate permissions by campus, each distinct campus should be defined. Separate campuses can also be created for non-physical entities/segments to allow for unique business processes and services. Those include distance learning, instructional sites, etc. Additionally, campus definitions and assignments can have an impact on the EAL logic performance related to default Case Manager assignment.</p> <p>Campuses can be assigned in user management or integrated through the authentication system.</p>									
Appears	<p>Caseload Management</p> <p>Reporting</p> <p>Early Alert Messages</p>									
Configuration	<p>Located in the Administration Group, Early Alert Subgroup</p>									
Parameters	<table border="1"> <thead> <tr> <th>Field</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Campus Name</td> <td>Label for the campus name</td> </tr> <tr> <td>Description</td> <td>Description of the campus</td> </tr> <tr> <td>Early Alert Coordinator</td> <td>Default coach to receive notifications</td> </tr> </tbody> </table>	Field	Definition	Campus Name	Label for the campus name	Description	Description of the campus	Early Alert Coordinator	Default coach to receive notifications	
Field	Definition									
Campus Name	Label for the campus name									
Description	Description of the campus									
Early Alert Coordinator	Default coach to receive notifications									
Default	<p>None</p>									
Example(s)	<p>North Campus, Distance Learning, Ford Teaching Center</p>									
Values										

### 4.2 Reasons

Definition	Referral Reasons are explanations for the Early Alert purpose. It provides information to the Case Manager and explains the purpose for the Early Alert notification. Only one Referral Reason can be defined per Early Alert by priority. This tool also has the ability to associate specific referral reasons with how those EAL should be routed if no Case Manager is assigned.	
Appears	Student Record, Early Alert	
Configuration	Located in the Administration Group, Early Alert Subgroup	
Parameters	Field	Definition
	Name	Label for the Referral Reason
	Description	Description of purpose and characteristics of the Referral Reason
Default	Academic Concern, Excessive Absences, Low Homework/Quizzes, Low Test Scores, Never Attended, Personal Concern, Tardiness, Other, Answered Yes to Critical Self Help Guide Question, Self Help Guide Threshold Exceeded	
Example(s)	Academic Concern, Personal Concern, Attendance, Low Test Score	
Values		
<b>4.3 Suggestions</b>		
Definition	This allows for faculty suggestions in the EAL tool. The Faculty Suggestion generally recommends a next step for the Case Manager and student.	
Appears	Student Record, Early Alert	
Configuration	Located in the Administration Group, Early Alert Subgroup	
Parameters	Field	Definition
	Name	Label for the Faculty Suggestion
	Description	Code to uniquely identify the Faculty Suggestion
Default	See Instructor, See Advisor or Coach, Counseling Services, The Tutoring/Learning Center, Writing Center, Tutoring Svcs, Disability Service Intervention, Withdraw, DEV Professional Tutoring, Other	

Example(s)	See Instructor, Tutoring Center, Withdraw, See case manager	
Values		
<b>4.4 Outcomes</b>		
Definition	Outcomes are responses for Case Managers to provide feedback to a faculty member based on an action taken for the Early Alert notification.	
Appears	Student Record, Early Alert	
Configuration	Located in the Administration Group, Early Alert Subgroup	
Parameters	Field	Definition
	Name	Label for the Outcome
	Description	Description of purpose and characteristics of the Outcome option
Default	Student Responded, Student Did Not Respond, Waiting for Response, Not an Early Alert Class, Duplicate Early Alert Notice	
Example(s)	Appointment Scheduled, No Response to phone, letter, or email, Problem Addressed	
Values		
<b>4.5 Outreaches</b>		
Definition	Outreaches are types of contacts that Case Managers attempt to reach a student in response to an Early Alert notification.	
Appears	Student Record, Early Alert	
Configuration	Located in the Administration Group, Early Alert Subgroup	
Parameters	Field	Definition
	Name	Label for the Outreach types
	Description	Description of purpose and characteristics of the Outreach option
Default	Phone call, Email, Letter, Text, In Person	

Example(s)	Phone call, Email, Letter, Text, In Person	
Values		
<b>4.6 Referrals (updated in v2.4)</b>		
Definition	Referrals are the destination locations that a coach may direct a student for additional assistance. These should be offices or resources to assist the student with resolving the reason for the Early Alert.	
Appears	Student Record, Early Alert	
Configuration	Located in the Administration Group, Early Alert Subgroup	
Parameters	Field	Definition
	Name	Label for the Referral
	Description	Description of the Referral
	Acronym	An acronym for the Referral type. Not used in the application
	Referral Email	A single email address associated with the Referral. This email address will be sent a message when a Referral is added to an Early Alert response.
	Carbon Copy	1 or more email addresses separated by a comma to associate with the Referral. This email address(es) will be sent a message when a Referral is added to an Early Alert response.
Default	None	
Example(s)	Writing Center, writingcenter@college.edu Academic Counselor, counselors@college.edu Financial Aid, fa@college.edu	
Values		
<b>4.7 Task Scheduler for Early Alert Overdue Response Email (added in v2.4)</b>		
Definition	Frequency with which the overdue Early Alert response email generation is executed. Specify a number to run the sync every x-many milliseconds. Or specify	

	<p>two numbers separated by a slash (60000/1000) to represent both a period and an initial offset. Or specify a cron expression.</p> <p>See <a href="http://www.manpagez.com/man/5/crontab/">http://www.manpagez.com/man/5/crontab/</a> for cron expression syntax. Default value means 'daily at 4AM, server-local time.</p>
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = task scheduler early alert trigger</p>
Default	0 0 4 * * * (4 am each day)
Values	
<b>4.8 Maximum Days to Consider Early Alert Response Overdue (added in v2.4)</b>	
Definition	The default number of days used to determine that an open Early Alert is overdue since the last response date. SSP will indicate the that Early Alert has is overdue by sending a daily email to the assigned coach and color the Early Alerts in the alert list and Caseload Assignment in red (overdue) and orange (open).
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = maximum_days_before_early_alert_response</p>
Default	2
Values	
<b>4.9 Overdue Early Alert Recipient list (added in v2.6)</b>	
Definition	For Early Alert overdue reminder emails, the person(s) notified is configurable. The email notification can go to the coach and/or the default coordinator associated to each Campus definition.
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = ear_reminder_recipients</p>
Options	<p>coach_only</p> <p>coach_only_or_eac_if_no_coach (default - matches current behavior)</p> <p>eac_only</p>

	coach_and_eac
Default	coach_only_or_eac_if_no_coach
Values	

## Counseling Reference Guide Settings

The Counseling Reference Guide is used to assist in the completion of the Action Plans and is typically considered a counseling knowledge based of predefined issues and possible solutions for student challenges. The reference guide is linked to the Student Intake, the Action Plan and the Student Self Help interface and will need to be completed to support those tools. The guide is however typically a living document and can always be added to, edited or expanded as the need arises. See the reference example provided to determine the types of Challenges and Referrals you might consider adding to the system.

The structure of the Reference Guide is:

Categories associates Challenges into a group for use in a specific Guide

Challenges represent a challenge or opportunity that a student might face. The Challenges list is an aggregate of all the potential solutions to this theme/concept/challenge.

Referrals represent specific actionable items that address student needs linked to one or many Challenges.

Challenges and referrals have a public and private description and can be made available in the student Self Help Guide. If the Self Help Guide will be implemented, both descriptions will need to be provided and can be the exact same description. This gives allows an opportunity to document specific processes or college proprietary information for Case Managers and have a different description for students and faculty to review.

### 5.1 Categories

Definition	Categories associate Challenges into a group for use in a specific Guide. Challenges can be assigned to multiple Categories.	
Appears	Counseling Reference Guide Self Help Guide	
Configuration	Located in the Administration Group, Counseling Reference Guide Subgroup	
Parameters	Field	Definition
	Name	Label for the Category



	Description	Description of purpose and characteristics of the Category option
Default	None	
Examples	First Year Advising, Disability Services, Distance Learning	
Values	The Counseling Reference Guide worksheet has been provided to list the Categories, Challenges, Referrals and all associations.	
<b>5.2 Challenges</b>		
Definition	Challenges represent obstacles a student needs to overcome, opportunities to work towards or steps to be taken to navigate the education journey. Challenges are grouped into categories and configured to be presented to Case Managers as well as Students. Challenges can be assigned to multiple Categories.	
Appears	Counseling Reference Guide Self Help Guide	
Configuration	Located in the Administration Group, Counseling Reference Guide Subgroup	
Parameters	Challenge Fields	Definition
	Challenge Name	Label for the Challenge
	Description	Description of purpose and characteristics of the Challenge
	Tags	One or more terms used by the search tool for this Challenge
	Confidentiality Level	Applicable Confidentiality Level for the Challenge
	Self Help Guide Description	Description of purpose and characteristics of the Challenge that appears in the Self Help Guide
	Self Help Guide Question	Question to determine if the student needs to see the Referrals for this Challenge. Always written that an affirmative answer will result in the Referrals being shown.
	Show in Student Intake	Indicator to display the Challenge on the Student Intake "Challenges" area?

	Show in Self Help Search	Indicator to return the Challenge in Self Help Guide searches
Default	Alcohol and/or Substance Abuse, Child or Adult Care, Classroom Issues, Computer/Email, Concentration (Poor Concentration), Cultural Awareness Issues, Emotions Mood and Stress, English as a Second Language, Finances – Education, Finances – Personal, Goals/Career Choices (Unclear), Grades, Grief and Loss, Housing/Shelter, Legal – Immigration, Maps/Directions, Motivation/Attitude, Other, Physical Health, Relationship Issues, Social Support (Lack of Support), Steps to Begin Sinclair, Study Resources, Test Anxiety, Time Management, Tired/Fatigue, Transportation, Undecided Major or Career Field	
Example(s)	Childcare Baby sitter, day care, etc  Transportation Car, bus, etc  Finances Money, unemployed, student loan	
Values	The Counseling Reference Guide worksheet has been provided to list the Categories, Challenges, Referrals and all associations.	
<b>5.3 Referrals</b>		
Definition	Referrals represent specific actionable items that address student needs. A Referral can be linked to many Challenges.	
Appears	Counseling Reference Guide Self Help Guide	
Configuration	Located in the Administration Group, Counseling Reference Guide Subgroup	
Parameters	Referral Fields	Definition
	Referral Name	Label for the Challenge Referral
	Description	Description of purpose and characteristics of the Challenge Referral

	Public Description	Description of purpose and characteristics of the Challenge that appears in the Self Help Guide
	Show in Self Help Guide	Indicator to display the Referral in the Self Help Guide
Default	56 defaults with associations to challenges	
Example(s)	<p>Challenge - Transportation</p> <p>Referral - Transfer money from the Pell Grant to use for purchasing supplies and services at the bookstore (Buss Pass)</p> <p>Challenge - Limited Computer Access</p> <p>Referral - Transfer money from the Pell Grant to use for purchasing supplies and services at the bookstore (Buy Netbook)</p>	
Values	The Counseling Reference Guide worksheet has been provided to list the Categories, Challenges, Referrals and all associations.	

## Journal Settings

The Journal allows for documenting interactions with students or capturing any note a case manager needs to make for future use. Sources and Sessions are used to prescribe and document interactions with students and expected outcomes.

The structure of a Journal Entry is:

Source indicates the origination of the information

Tracks(Types) are categories of Journal Entries

Steps(Numbers) are optional pre-determined points of contact

Details are common outcomes of Steps and Tracks

### 6.1 Sources

Definition	Journal Entry Sources indicate the origination of the information for a particular entry. This helps the Case Manager manage the communication channel and history of communication.	
Appears	Journal	
Configuration	Located in the Administration Group, Journal Subgroup	
Parameters	Field	Definition
	Name	Label for the Journal Entry Source type
	Description	Description of purpose and characteristics of the Journal Entry Source
Default	Appointment, CAP Transitioned, Case Management, Completed Action Steps, Early Alert Response, Email, ILP Transitioned, Phone Call, Referral	
Required Item	Early Alert Response	
Example(s)	Appointment, Phone Call, Intake, Early Alert, Email	
Values		

**6.2 Tracks**

Definition	Tracks are categories of Journal Entries used to associate Session Steps for programs	
Appears	Journal	
Configuration	Located in the Administration Group, Journal Subgroup	
Parameters	Field	Definition
	Name	Label for the Journal Track type
	Description	Description of purpose and characteristics of the Journal Track type
Default	CAP, EAL, ILP	
Example(s)	Individual Learning Program, Early Alert, Distance Learning	
Values	The Journal Track worksheet has been provided to list the Tracks, Steps, Details and all associations.	

**6.3 Steps**

Definition	Journal Steps are associated with Tracks to define common points of contact with the student. Programs may define single or multiple points of contact to simplify and guide contact with students.	
Appears	Journal	
Configuration	Located in the Administration Group, Journal Subgroup	
Parameters	Field	Definition
	Step Name	Label for the Journal Step type
	Description	Description of purpose and characteristics of the Journal Step type
Default	None	
Example(s)	Meeting 1, Meeting 2, Initial meeting, Pre-registration meeting, Mid-term check	
Values	The Journal Track worksheet has been provided to list the Tracks, Steps, Details and all associations.	

6.4 Details							
Definition	Journal Details are associated with Tracks/Steps to define common outcomes and/or tasks during a session.						
Appears	Journal						
Configuration	Located in the Administration Group, Journal Subgroup						
Parameters	<table border="1"> <thead> <tr> <th>Field</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Detail Name</td> <td>Label for the Journal Entry Session type</td> </tr> <tr> <td>Description</td> <td>Description of purpose and characteristics of the Journal Entry Session type</td> </tr> </tbody> </table>	Field	Definition	Detail Name	Label for the Journal Entry Session type	Description	Description of purpose and characteristics of the Journal Entry Session type
	Field	Definition					
	Detail Name	Label for the Journal Entry Session type					
Description	Description of purpose and characteristics of the Journal Entry Session type						
Default	None						
Example(s)	Register for next term, Confirm funding, Discuss education goals						
Values	The Journal Track worksheet has been provided to list the Tracks, Steps, Details and all associations.						

## Action Plan Settings

Note: Section 7- Action Plan Summary Text has been removed from the configuration.

### 7.1 Number of Days for Task Reminder (updated in v2.4)

Definition	The Number of days prior to expiration to send out a Task Reminder. Multiple reminders may be defined with a comma separate list.
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = numberOfDaysPriorForTaskReminder
Default	3
Example	2,3 (reminders will be sent 3 and 2 days prior to the due date)
Values	

## Email Message Templates

The Message Templates define the default email text for notifications and HTML for the MAP printouts. The message templates include notification, confirmation and response. The database is loaded with sample templates that should be changed before use.

### 8.1 Message Templates

Definition	The definitions and examples of the templates are located in the <a href="https://wiki.jasig.org/display/SSP/SSP+Message+Template+Definitions">SSP Wiki</a> . <a href="https://wiki.jasig.org/display/SSP/SSP+Message+Template+Definitions">https://wiki.jasig.org/display/SSP/SSP+Message+Template+Definitions</a>
Appears	Email messages and MAP printouts generated by SSP
Configuration	Located in the Administration Menu, System Configuration Tab, Message Templates Item

## 8.2 Application Title

Definition	The Title of the application
------------	------------------------------

Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = app_title
---------------	--

Default	SSP
---------	-----

Values	
--------	--

## 8.3 Institution Name

Definition	The institution name that appears throughout the application. The application will display that name as appropriate on the pages. For inclusion in message templates, the \$institutionName variable can be used to display the Institution Name value from the database.
------------	---

Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = inst_name
---------------	--

Default	My Edu
---------	--------

Values	
--------	--

## 8.4 Institution Home URL

Definition	The homepage of the Organization
------------	----------------------------------

Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = inst_home_url
---------------	--

Default	http://test.edu
---------	-----------------

Values	
--------	--

## 8.5 Server External Path



Definition	The externally visible url of the application
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = serverExternalPath
Default	http://ssp.test.edu
Values	
<b>8.6 Term to Represent Early Alert</b>	
Definition	Term to refer to early alerts, early intervention, etc
Configuration	Located in the Administration Menu, System Configuration Tab, Configuration Options Item Name = term_to_represent_early_alert
Default	Early Alert
Values	

## Accommodations Settings

The Accommodation settings support the disability office to identify students requiring assistance. In addition to the eligibility, the disposition and relevant accommodations can be tracked.

### 9.1 Disability Accommodations

Definition	Disability Accommodations is a list of accommodations to support the student	
Appears	Accommodation, Accommodations tab	
Configuration	Located in the Administration Group, Accommodation Subgroup	
Parameters	Field	Definition
	Name	Label for the Disability Accommodations type
	Additional Description	Determines if additional description is required when the type is select
	Description Label	Label for the additional description
	Long/Short Description	Determines if the additional description has a short or long entry box
Default	(Multiple) Training on computer software, Use of calculator, Enlarged print materials, Closed caption	
Example(s)	Training on computer software, Use of calculator, Enlarged print materials, Closed caption	
Values		

### 9.2 Disability Agencies

Definition	The Disability Agency is the source that certifies the disability of the student	
Appears	Accommodation, Agency Contacts tab	
Configuration	Located in the Administration Group, Accommodation Subgroup	

Parameters	Field	Definition
	Name	Label for the Disability Agency type
	Description	Description of purpose and characteristics of the Disability Agency type
Default	BSVI, BVR, MH, OPP, OTHER, TEST, VA	
Example(s)	BSVI, BVR, MH, OPP, OTHER, TEST, VA	
Values		
<b>9.3 Disability Statuses</b>		
Definition	The Disability Status identifies the official status of the student with the disability office.	
Appears	Accommodation, General tab	
Configuration	Located in the Administration Group, Accommodation Subgroup	
Parameters	Field	Definition
	Name	Label for the Disability Status type
	Description	Description of purpose and characteristics of the Disability Status type
Default	Eligible, ineligible, Pending, Revoked, Temporary Eligibility	
Example(s)	Eligible, ineligible, Pending, Revoked, Temporary Eligibility	
Values		
<b>9.4 Disability Types</b>		
Definition	Disability Types identify the specific disability of the student.	
Appears	Accommodation Tool, Disability Tab	
Configuration	Located in the Administration Group, Accommodation Subgroup	
Parameters	Field	Definition
	Name	Label for the Disability Type

	Description	Description of purpose and characteristics of the Disability Type
Default	ADD/ADHD, BLIND, DF, DH, EMO, HDH, LD, MULTI, OR, OTHER, SP, TBI, VIS	
Example(s)	ADD/ADHD, BLIND, DF, DH, EMO, HDH, LD, MULTI, OR, OTHER, SP, TBI, VIS	
Values		

## MyGPS Settings

Self Help Guides are available through MyGPS for authenticated and unauthenticated users. The guides represent a collection of Challenges associated with a guide topic. The challenges are posed as questions in the guide for the user to navigate and provide a response.

### 10.1 Self Help Guide

Definition	Self Help Guides are available for authenticated and unauthenticated student to identify Challenge and Referrals created in the Counseling Reference Guide.	
Appears	MyGPS, Self Help Guides	
Configuration	Located in the Administration Group, MyGPS Subgroup	
Parameters	Field	Definition
	Name	Label for the Self Help Guide
	Description	Description of the Self Help Guide displayed below the name in the list of guides
	Threshold	Reserved for future functionality
	Introduction	The introduction provided to users upon navigating the guide. This appears just before a user begins the navigation
	Summary	The summary provided as summary text upon completion of the guide
	Threshold Summary	Reserved for future functionality
	Early Alert Summary	Reserved for future functionality
	Published	Yes/No identifier for the guide to be published in MyGPS
	Authentication	Identifier to determine if the guide is available only for

	Required	authenticated users
	Associated Challenges	The Challenges in order to assign to the guide
Values	The Counseling Reference Guide worksheet has been provided to list the Categories, Challenges, Referrals and all associations.	
<b>10.2 MyGPS Tool Visibility (added in v2.6.0)</b>		
Definition	<p>The Task List appears for all students in MyGPS. There are four additional tools that can be configured for use in MyGPS. The tools listed in the configuration item will appear in MyGPS. Available tools are:</p> <ul style="list-style-type: none"> <li>• SELF HELP GUIDES- display of the configured Self Help Guide</li> <li>• CONTACT COACH- simple form to send an email to the assigned coach</li> <li>• SEARCH: search for challenges and referrals made available to the Self Help Guide and search</li> <li>• MAP- view of the students matrix formatted plan</li> </ul>	
Appears	MyGPS	
Configuration	<p>Located in the Administration Menu, System Configuration Tab, Configuration Options Item</p> <p>Name = mygps_visibile_tools</p>	
Default Values	SELF_HELP_GUIDES,CONTACT_COACH,SEARCH,MAP	
Values		

## MAP Settings

### 11.1 MAP Colors

**Definition** A list of colors can be defined and assigned to Elective Types. The colors are displayed in the MAP tool for planned courses with elective types.

**Appears** MAP Elective Types

**Configuration** Located in the Administration Group, MAP Subgroup

Field	Definition
Active	Determines if the color is active for assignment
Color Name	Label for the color
Color Code	User provided code for the color
Hex Code	Hex color code for color definition
Description	Description of the color, suggest using for assignment

**Default** Aqua, Brown, Fuchsia, Gray, Green, Lt Blue, Lt Green, Orange, Pink, Purple, Red, Salmon, Tan, Violet, Yellow

**Values**

### 11.2 MAP Electives

**Definition** Electives can be assigned to planned courses to indicate that the course will satisfy an elective requirement. The list of available electives are defined in this section.

**Appears** MAP planned courses

**Configuration** Located in the Administration Group, MAP Subgroup

Field	Definition
Order	The order in which the electives appears in the drop-down

	Active	Determines if the elective is active for assignment
	Elective Name	Label for the elective
	Elective Code	User defined code that displays in the tooltip
	Description	The description of the elective
	Color	The color assigned to the elective type
Example(s)	General Education, GenED, Blue Program Elective, Prog, Purple	
Values		
<b>11.3 MAP Tags</b>		
Definition	TAGs are characteristics of courses that allow users to quickly identify a course. The TAGs defined in administration must match values from the external_course_tag database table. Only active TAGs that match courses in external_course_tag will be available in MAP.	
Appears	MAP	
Configuration	Located in the Administration Group, MAP Subgroup	
Parameters	Field	Definition
	Active	Determines if the TAG will be displayed for matching courses in external_course_tag
	Tag Name	Label for the TAG
	Tag Code	User defined code that displays in course details and the available course list
	Description	Description of purpose and characteristics of the TAG
Example(s)	HON = Honors, DL = Distance Learning, TR = Transfer	
Values		



**11.4 Anonymous Template Access (added in v2.3)**

Definition	<p>Template visibility now controls the type of Template that is created. Each Template must be defined with an visibility level of Anonymous, Authenticated or Private. Anonymous Templates may be accessed publicly if the Anonymous Template Access configuration option is true. When the configuration is set to true and Anonymous Template(s) are defined, the Template definition can be access through the <a href="#">MAP API</a>.</p>	
Appears	API access only	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	anonymous_map_template_access	<p>True allow anonymous viewing</p> <p>False denies anonymous viewing</p>
Value		

**11.5 Calculate MAP Plan Status (added in v2.3)**

Definition	<p>SSP will calculate the Plan status for students with active plans. Previously, SSP used the data from external_person_planning_status to display Plan status information. The SSP calculated value will be used to display status information.</p>	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	calculate_map_plan_status	<p>True = SSP will calculate plan status, display the information and ignore the external database table</p> <p>False = SSP will use the external database table to display status information and not calculate a status</p>
Value		

**11.6 MAP Plan Status Matching Criteria (added in v2.3, updated in v2.4)**

Definition	<p>By default SSP uses the formatted course and term code to match Plan courses against transcript courses to determine the student's Plan status. Additional criteria</p>
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	can be used to be more precise about the match including title and hours. A new criteria, COURSE_CODE, was added in v2.4	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	map_plan_status_addition_course_matching_criteria	Options values include: COURSE_TITLE CREDIT_HOURS COURSE_CODE
Default	No additional criteria	
Value		
<b>11.7 MAP Plan Status Cutoff Term (added in v2.3)</b>		
Definition	When calculating the Plan status for a student, SSP will use current and past term to match against transcript courses. SSP will not look forward past the current term unless a cutoff term is defined. The cutoff term will be a term in the future to include so that future terms with registered courses can be included in the Plan status calculation.	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	map_plan_status_cutoff_term_code	Default = current term Any valid term code
Example(s)	(blank) the current term as calculated by SSP FA2014 to represent Fall 2014	
Value		
<b>11.8 MAP Plan Status Passing Grades (added in v2.3)</b>		

Definition	In addition to matching Plan and transcript courses to determine the status, SSP will also validate that transcript courses were passed by the student to determine the status. Any non-passing grade on a transcript course will result in the transcript course not matching the Plan course.	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	map_plan_status_passing_grades	A delimited list of passing grades
Default Values	A+, A, A-, B+, B, B-, C+, C, C-, D+, D, D-	
Example(s)	A, B, C, D	
Value(s)		

### 11.9 Task Scheduler for MAP Plan Status (added in v2.3)

Definition	<p>Frequency with which the MAP Plan status calculation is executed. This may resource intensive, so should be run during off hours. Specify a number to run the sync every x-many milliseconds. Or specify two numbers separated by a slash (60000/1000) to represent both a period and an initial offset. Or specify a cron expression.</p> <p>See <a href="http://www.manpagez.com/man/5/crontab/">http://www.manpagez.com/man/5/crontab/</a> for cron expression syntax. Default value means 'daily at 1AM, server-local time.'</p>	
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item	
Parameters	Field	Definition
	task_scheduler_map_plan_status_calculation_trigger	A cron expression or offset to determine the schedule for executing the Plan status calculation
Default Value	0 0 3 * * * (daily at 3am)	
Value(s)		

**11.10 Allow Edit of Past MAP Plan Terms (added in v2.3)**

Definition	Controls the ability to edit past terms on a MAP plan. The default behavior is to restrict any edits to a past term. Enabling this option will allow for any past term on a plan to be edited.
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item
Default Value	False
Value(s)	

**11.11 MAP Plan Status Send Report (added in v2.4)**

Definition	Option to send an email summary each time the plan status calculation job is run. The summary includes the total number of plans calculated and a count for each plan status.
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item
Value(s)	

**11.12 MAP Plan Status Email (added in v2.4)**

Definition	Email address to which the calculation status summary email should be sent. The email is sent if map_plan_status_send_report_email is set to true
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item
Default Value	False
Value(s)	

**11.13 MAP Plan Status Send Off Plan Coach Email (added in v2.4)**

Definition	Option to send an email summary to coaches when an assigned student is calculated to be off plan. The email includes a list of students by name that are off plan..
Configuration	Located in the Administration Group, System Configuration folder, Configuration

	Options item
Default Value	False
Value(s)	
<b>11.14 MAP Plan Status Term Bound Strict (added in v2.4)</b>	
Definition	Determine if SSP will use in the plan status calculation and display. By default, SSP will only use the exact courses on the plan and transcript. If this option is set to false, the calculation will match transcript courses matched in different terms than the plan. This option will control the display of the status in the Student Search and plan status displays. If a plan utilizes a different sequence for non-On Plan calculations, the status will be On Track Sequence.
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item
Default Value	True
Value(s)	
<b>11.15 MAP Plan Status Use Substitutable Courses (added in v2.4)</b>	
Definition	Determine if SSP will use substitutable courses in the plan status calculation and display. By default, SSP will only use the exact courses on the plan and transcript. If this option is set to true, the calculation will match transcript courses for substitutable courses defined in the external_substitutable_course table. This option will control the display of the status in the Student Search and plan status displays. If a plan utilizes substitutable courses for non-On Plan calculations, the status will be On Track Substitution.
Configuration	Located in the Administration Group, System Configuration folder, Configuration Options item
Default Value	False
Value(s)	