

Best Practices: Custom Alerts, Tags, Filtering

Please use this list to document and share best practices around using Custom Alerts, Tags, and Saved Filters.

Definitions

Alerts - circumstances that have a negative impact on a student's academic record, finances, or other areas, such as dropping all of one's courses. Alerts often require advisors to quickly follow-up with the student.

Warnings – circumstances that need some sort of action soon, but typically not before alerts. If a student does not resolve the warning, it could turn into an alert.

Notifications - system-generated emails sent to student services professionals regarding their advisees. For example, notifications may be received about Appointments, Alerts and Warnings, and Academic Alerts from instructors.

Exceptions - an adjustment made to any alert or warning. Once the exception is applied, it will stay on until the exception is no longer true. If a student has an exception to a specific alert/warning then the alert/warning will not be applied to the student until the exception no longer applies.

Custom Alerts

Provide users with timely notification of student circumstances

- Can be an Alert, Warning, or Positive(notification)
- Viewable only by the user
- Apply only to your student population

Example Custom Alerts:

Retention priority category of medium-high	Add Filter: Retention Priority Contains: Medium High
Denied ICT transfer for the upcoming term	Add Filter: College admit = All Institution = Twin Cities Academic Career = Ugrd

	Admit Type = ICT Admit Term = Next Term Admit Status = Denied Current Term Status = anything
Received a D/F/W grade in CHEM 1015	Add Filter: Course grade = check D, F, W grades Subject = CHEM Catalog Number = 1015 Course Term = current term
Custom Tag based alert, ie "Notify Supervisor"	Add Filter: Tag = Notify Supervisor (custom)

Custom Tags

Tags are specific to the student and not associated with a contact. They are typically used to track details about the student, such as involvement in programs or marking the completion of required items. Tags can be assigned to students with any of the interfaces on APLUS that allow 'Adding a tag' to a student, or through Bulk Operations

Example Uses for Custom Tags:

- Add a tag for a group of students participating in a program, mentorship, experience, etc
- Track unit-specific processes, ie completed mandatory online workshop
- Identify groups of students (beyond the already identifiable characteristics in APLUS), ie cohorts, caseloads (not used for advisor assignments)
- Notify my supervisor / outreach

Contact Purposes

Contact purposes are used to summarize information in a contact. They provide a quick way to search, filter, and understand the purpose of a contact. Contact purposes can be found as a checkbox in the 'Log Contact' interface or any other interface that allows assigning purposes to contacts

Example Uses for Custom Contact Purposes:

- Send individualized notification emails based on appointment type (ie probation, resume review, etc).
 - Create contact purposes, add to intake - Actions (Answer) -> Tag Options -> + Contact Purpose
 - Create new notification set in Preferences -> Calendar -> Notifications
- Automated survey emails based on appointment type
- Use for annual reporting data to easily show appointment purposes
- Limit appointment availability to certain appointment types, ie probation appointments are 1-hour long, vs all other appointments are 30-min

Filtering

Filters allow you to work with subsets of your student population(s) and are especially useful for those with large caseloads. You can filter your student population by Academic Plan, Cumulative Credits, Tag, among many options. You can add any number of filter items and save filters to use in the future. Your Saved filters will appear in the Add Filter drop-down menu.

Example Filters

Students with AU holds	Hold/Service Indicator filter Hold/Service Indicator = AU - student account past due
First Gen Students	Recruitment Category filter Recruitment category = First Gen
Students with an OA hold who do not have an upcoming appointment scheduled	Hold/Service Indicator filter Hold/Service Indicator = OA - College Advisor Approval Active Term = current term Active = currently active Contacted filter Contacted = never or before date = [today's date] contact type = contains = appointment, drop-in, etc.

	modality = anything contact status = is successful contact purpose = any contacted by = [your unit] by staff member = [your name]
Students registered for Summer 2025 courses, who are interested in pre-law, and have not previously taken OUE 3205	Population - Term Summer 2025 Tag filter Tag = Pre-Law Unit = Any Course Grade filter Course Grade is anything Subject = OUE Catalog Number = 3205 Course Term is anything Enrollment Status = enrolled Criteria Type does not exist Institution filter Course term = Summer 2025 Enrollment status = enrolled Criteria Type exists
Students who applied/confirmed/admitted/denied to another UMN college for ICT transfer (dependent on when receiving college processes ICT admissions)	College Admit filter Tag = Pre-Law Unit = Any Co
Students who are graduating this upcoming term	

Reports

APLUS contains a variety of reports. The reports that you have access to and the data on the reports will depend on your role. For example, two commonly used reports are **Contacts** and **Contact Totals**. Someone in a Coordinator role will be able to see totals for all staff/faculty in the unit or sub-unit, while someone in an Advisor role will only see their contact totals.

Depending on the report, there can be multiple filter and display options that can be customized. You can save your current filters and display options with a custom report name. This provides quick and easy access to the reports you customize and use the most.

[Reports Help Guide](#)

Example Reports

****link to spreadsheet**

Report & Data Question	Filters	Display Options	Summary/definition of report results
Contact Totals How many students did my unit meet with in the last academic year, in appointments and drop-ins? How many were online vs. in-person?	Contact Date After date - Sept 3, 2024 Never or before date - May 15, 2025 Contact Type Contains: Appointment, Drop-in Successful Is equal to: True	Vertical Axis Unit Horizontal Axes Contact Type and Modality Data Axis Total Contacts	
Contact Totals How many appointments were used online vs in-person, relative to what modalities were offered?	Contact Date After date - Sept 3, 2024 Never or before date - May 15, 2025 Contact Type Contains: Appointment	Vertical Axis Unit Horizontal Axis Contact Type and Offered Modalities Data Axis Offered Modality Usage	
Appointment/Drop-in Fill Rates How many appointment/drop-in slots were filled, relative to how many were offered?			

Appointment/Drop-in Lag Time On average, how many days did students have to wait for an available appointment? (from the booking date to the first available appointment)			
Intended Majors (Current)	Academic Program (intended) filter Academic Program (Intended = CLA) Academic Plan = Art History BA Academic Sub Plan is anything		
Leave of Absence (Twin Cities only)			
Referrals Report			