

# Mentor perspective

## Get training

### Capabilities

1. peer training (eg peer training program with other advisers)
2. systems training (ie training on various systems: SIS, degree audit)
3. learner behaviors training (interpersonal skills, privacy concerns, etc.)

### Information

1. Course guide
2. Catalog
3. Degree audit rules
4. Enrollment and registration information
5. Student academic record
6. Academic/regulatory policy (HIPAA, FERPA, etc.)

## Discovery

### Capabilities

1. cohort management (being able to discover the group of students who need advising)
2. Access to academic records
3. Access to curricular information (programs, course descriptions, etc.)
4. Access to case history
5. Assessment management (e.g., interests, skills, learning style, prior learning, etc.)

### Information

1. Academic records
2. Curricular information
3. Learner goals
4. Learner profile information (contacts, bio/demo)
5. Case histories
6. Academic policies and rules

## Relationship Management

1. Manage communication channels
  - a. chat
  - b. email
  - c. social
2. Manage calendar/scheduling
3. Case management
4. Workflow management
5. Curricular/rule overrides
6. Learner relationship management
7. Instructor relationship management

### Information

1. Academic records
2. Curricular information
3. Learner goals
4. Learner profile
5. Instructor profile
6. Cases
7. Academic policies and rules
8. Communication artifacts (emails, etc.)
9. Calendar

## Provide advice and intervention

### Capabilities

1. Provide academic advice
2. Monitor mentee performance
3. Enforce academic policy
4. Provide financial advice
5. Provide career advice
6. Case management

### Information

1. Academic records
2. Curricular information
3. Occupational information

4. Learner goals
5. Learner profile
6. Instructor profile
7. Cases and histories
8. Academic policies and rules

**Follow up**

1. Academic record management
2. Academic policy enforcement/overrides