

Buff Portal Advising


Student User Guide



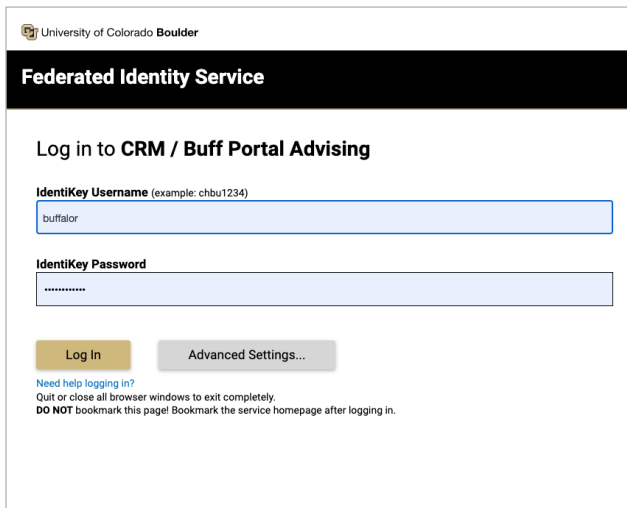
University of Colorado
Boulder

Login and User Interface

 <https://www.colorado.edu/buffportaladvising/>

 CULoginName (also known as IdentiKey Username)

 IdentiKey Password



Buff Portal Advising login page



- 1. Student Success Team:** Displays your success team. Click on their picture to schedule an appointment.
- 2. Student Services:** Links to calendars or websites for listed campus offices. *Note: Continuing Education is separate from CU Boulder main campus.*
- 3. Undergraduate Term by Term Summary:** Overview of your academic record. Lists current courses and grades, as well as cumulative summary of all terms.
- 4. Preferences:** Cog wheel icon that links users to notification settings (more on page 4).
- 5. Actions & Alerts:** Displays alerts and holds from campus offices.
- 6. Meetings:** A list of meetings, both past and pending.
- 7. Links:** Campus links including, Degree Audit and Buff Portal.
- 8. Academic Major/Minor:** A list of your enrolled majors and minors.
- 9. Placement Assessments:** Provides access to scores on math, language, writing and CliftonStrengths.
- 10. Undergraduate Performance:** Provides information on credit hours earned and GPA.

Appointments

Schedule an appointment

1. Click on a **Success Team Member's picture**, which will bring you directly to their calendar (step 2).
2. Select an available appointment time with the appropriate member of your success team. You can use the arrows at the top of the page to navigate to the following week.
Note: Drop-ins are not reservable.
3. Enter your reason for the appointment in the **Desired Outcome** field. The staff member may offer appointments in-person, by phone, or video advising (similar to FaceTime or Skype). When available, choose the option you prefer and click **Next**.
4. Confirm the information for your appointment and click **Book Appointment**. Buff Portal Advising will send an email confirmation of your appointment and reminders at 72 and 24 hours. You can also opt-in to text notifications (see page 5).

Step 1: Success Team

Click photo below to view member's calendar and book appointment

Step 2: Meetings

Aug 1 - 7, 2021

Time zone: All times displayed in Mountain Time

	Sun 8/1	Mon 8/2	Tue 8/3	Wed 8/4	Thu 8/5	Fri 8/6	Sat 8/7
all-day							
8am		8:30 - Charles E.'s PSYC	8:30 - Charles E.'s PSYC	8:30 - Charles E.'s PSYC	8:30 - Charles E.'s PSYC	8:30 - Charles E.'s PSYC	
9am		9:15 - 10:00 Sarah M.'s	9:15 - 10:00 Sarah M.'s	9:15 - 10:00 Sarah M.'s	9:15 - 10:00 Sarah M.'s	9:15 - 10:00 Sarah M.'s	
10am		10:00 - 10:45 Charles E.'s	10:00 - 10:45 Charles E.'s	10:00 - 10:45 Charles E.'s	10:00 - 10:45 Charles E.'s	10:00 - 10:45 Charles E.'s	
11am		10:45 - 11:30 Sarah M.'s	10:45 - 11:30 Sarah M.'s	11:00 - 11:45 Charles E.'s	11:00 - 11:45 Sarah M.'s	11:00 - 11:45 Charles E.'s	
12pm		11:30 - 12:15 Sarah M.'s	11:30 - 12:15 Sarah M.'s	11:45 - 12:30 Sarah M.'s	11:45 - 12:30 Sarah M.'s	11:45 - 12:30 Sarah M.'s	
1pm		1:00 - 1:45 Charles E.'s	1:00 - 1:45 Charles E.'s	1:00 - 1:45 Charles E.'s	1:00 - 1:45 Charles E.'s	1:00 - 1:45 Charles E.'s	
2pm		2:00 - 2:45 Charles E.'s	2:00 - 2:45 Charles E.'s	2:00 - 2:45 Charles E.'s	2:00 - 2:45 Charles E.'s	2:00 - 2:45 Charles E.'s	
3pm		3:00 - 3:45 Charles E.'s	3:00 - 3:45 Charles E.'s	3:00 - 3:45 Charles E.'s	3:00 - 3:45 Charles E.'s	3:00 - 3:45 Charles E.'s	
4pm							

Step 3: Desired Outcome

What would you like to discuss in your meeting?

Characters left: 1001

How would you like to meet?

- In Person
- Phone
- Video Advising

Step 4: Appointment Details

Title: Individual Biology Advising Appointment

Advisor: Tim Houston

When: Monday, August 15 2016, 1:00 pm - 1:30 pm

Where: Porter B126E

Description: Please provide a desired outcome for this appointment.

Desired Outcome: I would like to discuss my course schedule and internship opportunities

Cancel an appointment or Change Meeting Format

- From the Buff Portal Advising home page navigate to the **My Meetings** box and click **Update**.
 - To Cancel** - On the Meeting Confirmation page, click in the box next to **Confirm Attendance** and select No – cancel appointment then **Save**.
 - To change Meeting Format** - On the Meeting Confirmation page, click in the box next to **Meeting Format** and select the desired format (when available) then **Save**.

Step 1: My Meetings

Show History

All Appointment Types

Meeting Type: Individual Appointment
 Title: This is Ralphie's default meeting title
 Advisor / Facilitator: Ralphie Advisor
 Date/Time: 04/07/2020 9:00 AM MDT
 Location: Video Advising - https://ralphiezoom.com
 Status: Confirmed

Step 2: Meeting Confirmation

This is Ralphie's default meeting title / 04/07/2020 9:00 AM MDT / Ralphie Advisor

Full Name: Albert Einstein

Desired Outcome: [Text Area]

Confirm Attendance: No - cancel appointment

Meeting Format: Video Advising

Step 3: Save

Appointment Calendar Tips

1 Calendar toggle

Click on a success team member's picture to toggle their calendar on and off.

2 Appointment type toggle

Filter available meetings by format type: in person, phone, video advising. Select **Drop-ins and Open Hours** to display or hide those meetings, and **Other Helpful Meetings** to show additional appointment options.

3 List view

Switch to **List** view by clicking the option in the top right. Select an available meeting time by clicking on the appropriate success team member's name.

The screenshot displays the 'My Success Team' sidebar on the left and the 'Meetings' calendar on the right. The sidebar includes a list of team members (Charles Eagan and Sarah Matsuda) with checkboxes, a 'Select Format Section' dropdown set to 'Any', and 'Other Filters' where 'Drop-Ins and Open Hours' is checked. A 'Key' section at the bottom explains meeting statuses. The main calendar shows a list view for August 1-7, 2021, with columns for time slots, meeting details, availability, format, and the advisor's name. A 'Book Individual Appointment' button is visible for several slots.

Monday	August 2, 2021
8:30am - 9:00am	● Charles E.'s PSYC/NRSC Zoom Advising Appt. Not Available Video Advising - https://cuboulder.zoom.us/my/charleseagan Charles Eagan
9:15am - 10:00am	● Sarah M.'s ARTH/ARTS/ENGL/CINE Advising Appt via Zoom Not Available Video Advising - https://cuboulder.zoom.us/my/sarahmatsuda Sarah Matsuda
9:15am - 9:45am	● Charles E.'s PSYC/NRSC Zoom Advising Appt. Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/charleseagan Charles Eagan
10:00am - 10:45am	● Charles E.'s PSYC/NRSC Zoom Advising Appt. Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/charleseagan Charles Eagan
10:00am - 10:45am	● Sarah M.'s ARTH/ARTS/ENGL/CINE Advising Appt via Zoom Not Available Video Advising - https://cuboulder.zoom.us/my/sarahmatsuda Sarah Matsuda
10:45am - 11:30am	● Sarah M.'s ARTH/ARTS/ENGL/CINE Advising Appt via Zoom Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/sarahmatsuda Sarah Matsuda
11:00am - 11:45am	● Charles E.'s PSYC/NRSC Zoom Advising Appt. Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/charleseagan Charles Eagan
11:30am - 12:15pm	● Sarah M.'s ARTH/ARTS/ENGL/CINE Advising Appt via Zoom Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/sarahmatsuda Sarah Matsuda
1:00pm - 1:45pm	● Charles E.'s PSYC/NRSC Zoom Advising Appt. Book Individual Appointment Video Advising - https://cuboulder.zoom.us/my/charleseagan Charles Eagan

Calendar in list view

Preferences Center

1 Mobile Preferences

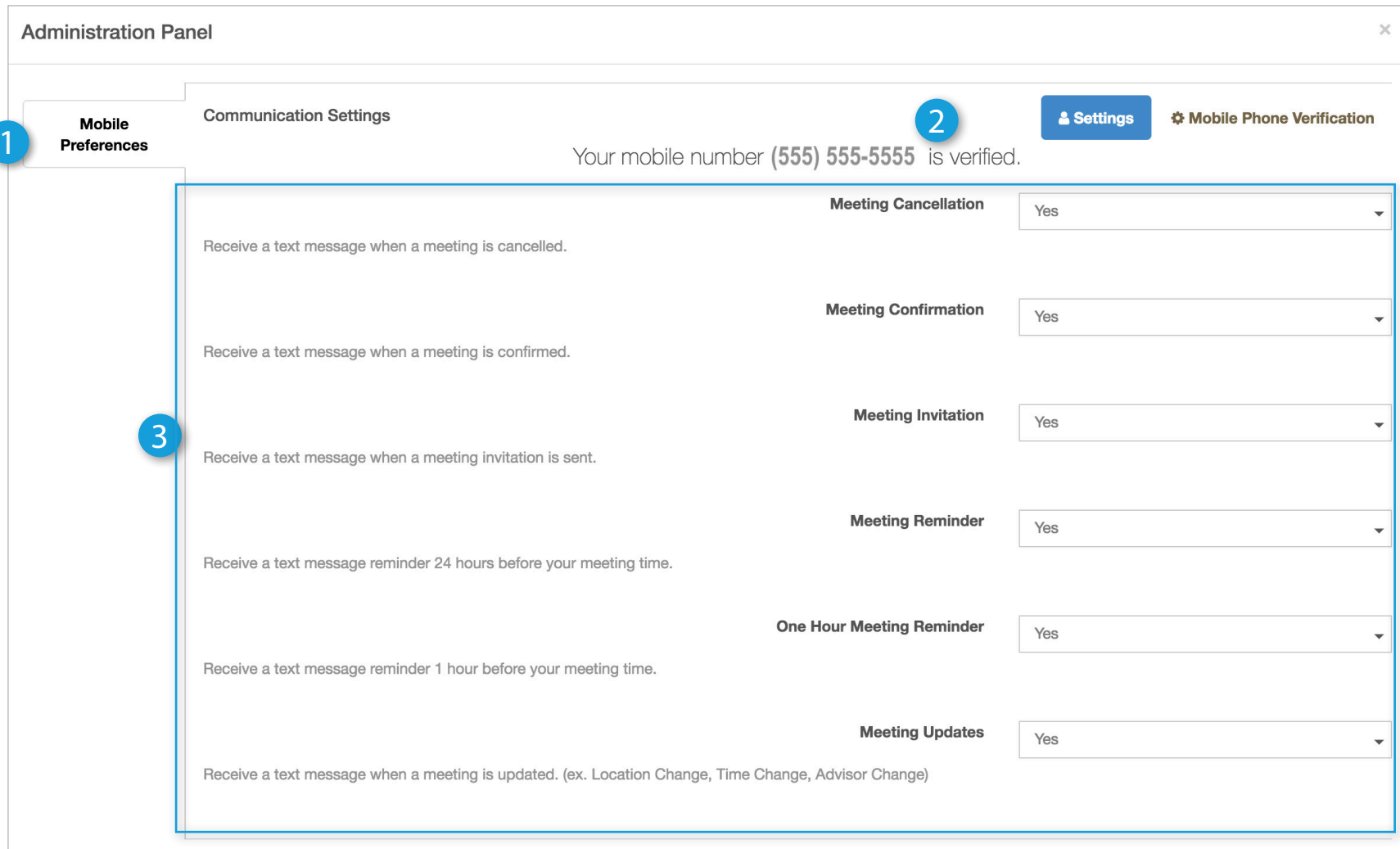
Opt in to receiving text messages related to meetings scheduled in Buff Portal Advising (confirmations, reminders, location changes, etc.)

2 Phone Number

To receive meeting information via text, first validate your mobile number.

3 Notifications List

Once validated, you will be able to specify what type of notifications to receive.



The screenshot shows the 'Administration Panel' with a 'Mobile Preferences' sidebar on the left. The main content area is titled 'Communication Settings' and includes a 'Settings' button and a 'Mobile Phone Verification' section. A status message indicates that the mobile number '(555) 555-5555' is verified. Below this, a list of notification preferences is shown, each with a dropdown menu set to 'Yes'. The preferences are: Meeting Cancellation, Meeting Confirmation, Meeting Invitation, Meeting Reminder, One Hour Meeting Reminder, and Meeting Updates. A blue box highlights the notification list, and a blue circle with the number '3' is placed next to it. Another blue circle with the number '2' is placed above the 'Mobile Phone Verification' section, and a blue circle with the number '1' is placed next to the 'Mobile Preferences' sidebar.

Administration Panel ✕

Mobile Preferences

Communication Settings 2 [Settings](#) [Mobile Phone Verification](#)

Your mobile number **(555) 555-5555** is verified.

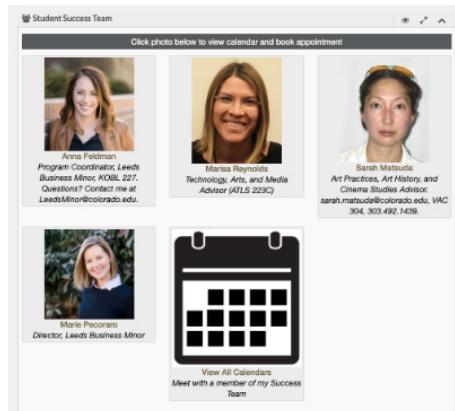
Receive a text message when a meeting is cancelled.	Meeting Cancellation	Yes
Receive a text message when a meeting is confirmed.	Meeting Confirmation	Yes
Receive a text message when a meeting invitation is sent.	Meeting Invitation	Yes
Receive a text message reminder 24 hours before your meeting time.	Meeting Reminder	Yes
Receive a text message reminder 1 hour before your meeting time.	One Hour Meeting Reminder	Yes
Receive a text message when a meeting is updated. (ex. Location Change, Time Change, Advisor Change)	Meeting Updates	Yes

Schedule Appointment

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Note: Drop-ins are not reservable.

3. Enter your reason for the appointment in the **Desired Outcome** field. The staff member may offer appointments in-person, by phone, or video advising (similar to FaceTime or Skype). When available, choose the option you prefer and click **Next**.
4. Confirm the information for your appointment and click **Book Appointment**. Your appointment will be booked and you should receive a confirmation email within 24 hours. Buff Portal Advising will send an email confirmation of your appointment and reminders at 72 and 24 hours. You can also opt-in to text notifications (see page 5).



The screenshot shows a calendar interface for the week of May 31 to June 6, 2020. The time zone is set to Mountain Time. The calendar displays appointment slots for several team members: Anna Feldman, Marisa Reynolds, and Sarah Matsuda. The slots are color-coded and include details such as the time and the member's name. For example, on Tuesday, June 2nd, there are slots for Anna Feldman (9:30-10:00, 11:00-11:30, 12:00-12:30, 1:00-1:30, 2:00-2:30) and Sarah Matsuda (10:30-11:15, 11:15-12:00). On Thursday, June 4th, there are slots for Marisa Reynolds (8:30-9:15, 9:15-10:00, 10:30-11:15, 11:00-11:30, 11:30-12:00) and Sarah Matsuda (10:30-11:15, 11:15-12:00). A blue circle with the number '2' is overlaid on the calendar header.

The screenshot shows the 'Book Appointment' form. It has a title bar with a close button. The form contains a text area for 'Desired Outcome' with the placeholder text 'What would you like to discuss in your meeting?' and a character count of 1001. Below this is a section for 'How would you like to meet?' with three radio button options: 'In Person' (selected), 'Phone', and 'Video Advising'. At the bottom of the form are 'Next' and 'Cancel' buttons. A blue circle with the number '3' is overlaid on the 'Next' button.

The screenshot shows the 'Appointment Details' form. It displays the following information: Title: Individual Biology Advising Appointment; Advisor: Tim Houston; When: Monday, August 15 2016, 1:00 pm - 1:30 pm; Where: Porter B126E; Description: Please provide a desired outcome for this appointment. The 'Desired Outcome' field contains the text 'I would like to discuss my course schedule and internship opportunities'. A blue circle with the number '4' is overlaid on the 'Desired Outcome' field. At the bottom of the form are 'Close' and 'Book Appointment' buttons.