

Due Diligence in Alternative Methods of Advising

(Adapted for COVID-19 closure)

In order to best serve students with a UNM record that are unable to attend in-person advising sessions, University of New Mexico advisors may offer appointments via phone, Skype, Zoom, Email, Instant Messaging, or other means. To be FERPA compliant we must practice due diligence in confirming students' identities before discussing information from student records. Keep in mind that FERPA does not apply to prospective students. The FERPA starting point at UNM is when new students attend the first day of classes. The following provides guidance on how to proceed in various methods.

In all instances use your UNM or department accounts in contacting students through web based media. Be mindful that student records should not be linked to personal accounts.

Phone Advising

- At the start of the advising session, the advisor shall ask questions to confirm the student's identity such as:
 - First semester attended at UNM
 - List classes taken the first semester along with grades earned
 - List institutions for which they have transfer work (note: this is a trick question for those without transfer credit)
- Begin the session with open-ended questions, which will allow the student to describe their situation. As the conversation proceeds, they should be describing what you see on record.
- Halt the advising session if the person does not appear to possess familiarity with the record, or the person begins referring to the student in a third person.

Verifying identity:

- If your student has a camera, have the student show you their ID (only through Zoom. Skype requires a UNM ID to log in)
- If your student does not have a camera ask the same questions you would if you were on a phone appointment. (do not ask demographic questions, or questions that a person close to them would know the answer to).

Video and Audio Advising

- Ask the student to show their UNM ID card or government issued photo ID at the beginning of the Advising session.
- If an ID card is not handy, you may follow the phone advising protocol.
- If the student is able, have them share their screen so that they navigate LoboWeb and Degree Audits through their authentication process.

Email or Instant Messaging (text) via UNM Accounts

Administrative Policies and Procedures Manual – Policy 2540: Student Email

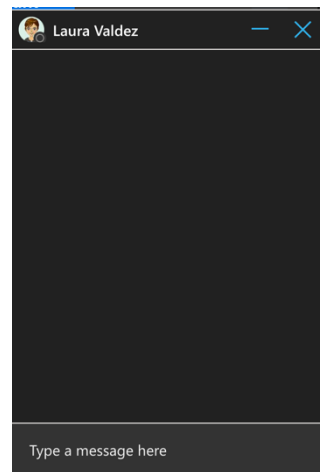
(<https://policy.unm.edu/university-policies/2000/2540.html>) sets the UNM email as a “mechanism for formal communication by the University.”

- Since the UNM email system requires authentication, you may be assured that email or IM is coming directly from the student.
- You may only disclose directory information (see below) in a non-UNM email account.

- If a student contacts you from a non-UNM account and has a confidentiality indicator on their record, you may only provide general information. Example: listing the pre-requisites for a class rather than stating the specific requirements the student is lacking.
- Suggested responses or an email signature is:

Note: In order to comply with the Family Educational Rights and Privacy Act of 1974 (FERPA), UNM students must correspond with me using their UNM email account. Students must include their full name and ID number, so that I can locate their record. I cannot respond with any information contained in educational records from emails received from non-UNM accounts. For information on FERPA, please visit <http://ed.gov/policy/gen/guid/fpco/ferpa/students.html>.

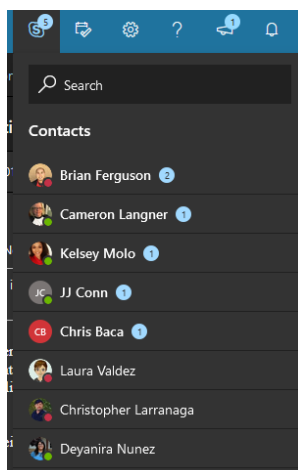
1. Using skype
 - a. Have students log in through the Skype for Business app
 - b. Office 365 through Lobomail (top right hand corner):



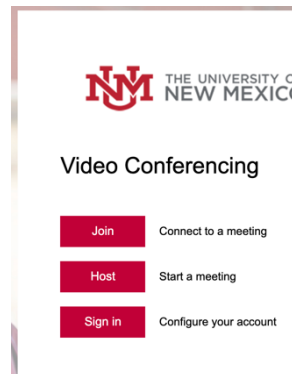
Accessing Zoom:

Every employee can log steps to configuring meetings:

1. Go to
2. Click on Sign in. account)



into Zoom and build online meeting space. Here are the your account and creating



<https://unm.zoom.us/>

(Configure your

3. Click on meetings

Profile **Meetings** Webinars Recordings Settings Account Profile Reports

Attend Live Training
Video Tutorials
Knowledge Base

Lucy Advisor [Edit](#)

Account No. 114822

[Change](#)

Personal Meeting ID	516-430-8892	Edit
	https://unm.zoom.us/j/5164308892	
	× Use this ID for instant meetings	
Sign-In Email	Linked accounts:	
User Type	Basic	
Capacity	Meeting 300	
Language	English	Edit
Date and Time	Time Zone (GMT-6:00) Mountain Time (US and Canada)	Edit

4. Update Topic, Description, When, Duration (which is limited to 40 minutes)

Profile **Meetings** Webinars Recordings Settings Account Profile Reports

Attend Live Training
Video Tutorials
Knowledge Base

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants. Upgrade now to enjoy unlimited group meetings. Contact [UNM Media Support](#)

Do not show this message again

Time Zone

Recurring meeting

Meeting ID Generate Automatically Personal Meeting ID 516-430-8892

[Help](#)

5. There is no need to change anything on the remaining items. Click Save.

Meeting Password Require meeting password

Video

Host on off

Participant on off

Audio

Telephone Computer Audio Both

Dial from United States of America [Edit](#)

Meeting Options

Enable join before host

Mute participants upon entry [?](#)


Enable waiting room

Only authenticated users can join

Record the meeting automatically on the local computer

[Save](#) [Cancel](#) [Help](#)

6. Students can join the meeting you created by you sharing the Join URL.

 [SIGN OUT](#)

[Profile](#)

[Meetings](#)

[Webinars](#)

[Recordings](#)

[Settings](#)

[Account Profile](#)

[Reports](#)

[Attend Live Training](#)

[Video Tutorials](#)

[Knowledge Base](#)

[My Meetings](#) > [Manage "My Meeting"](#) [Start this Meeting](#)

Topic My Meeting

Time Mar 15, 2020 03:00 PM Mountain Time (US and Canada)

Add to [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID 961-593-880

Meeting Password Require meeting password

Join URL: <https://unm.zoom.us/j/961593880> [Copy the invitation](#)

Video

Host Off

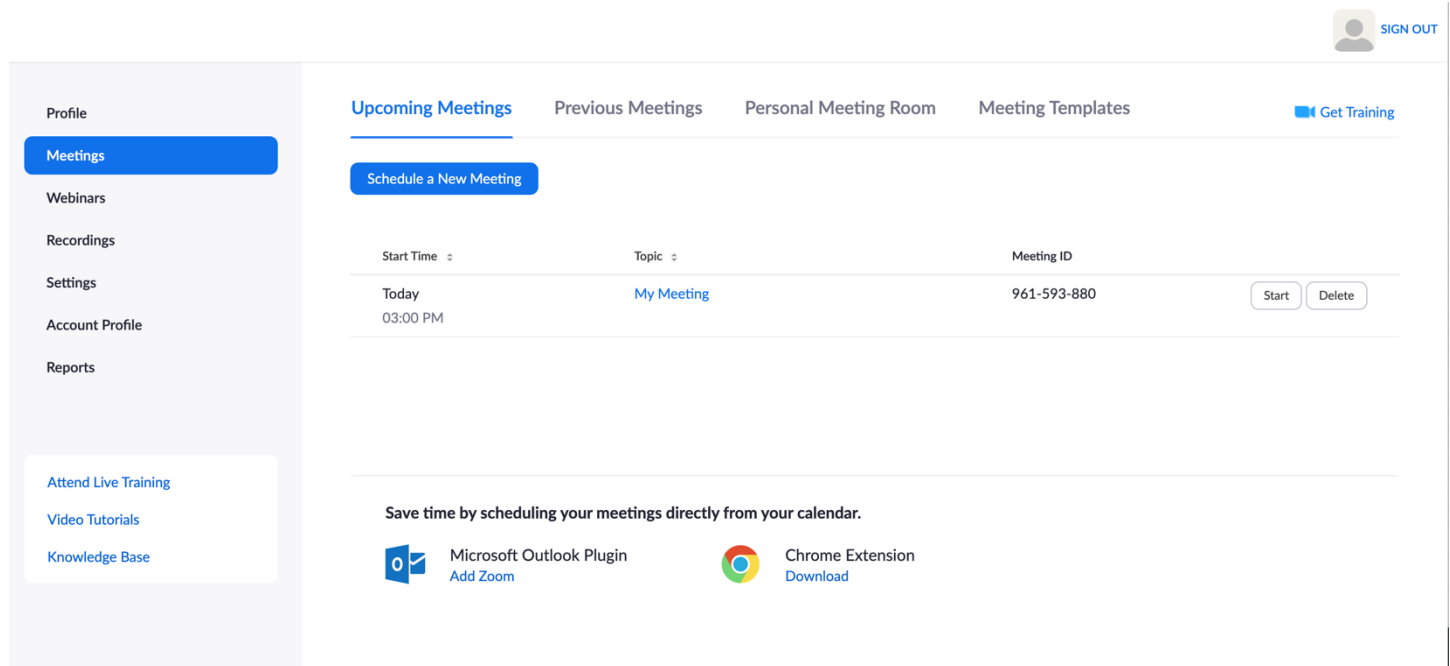
Participant Off

Audio Telephone and Computer Audio

Dial from United States of America

Meeting Options Enable join before host [Help](#)

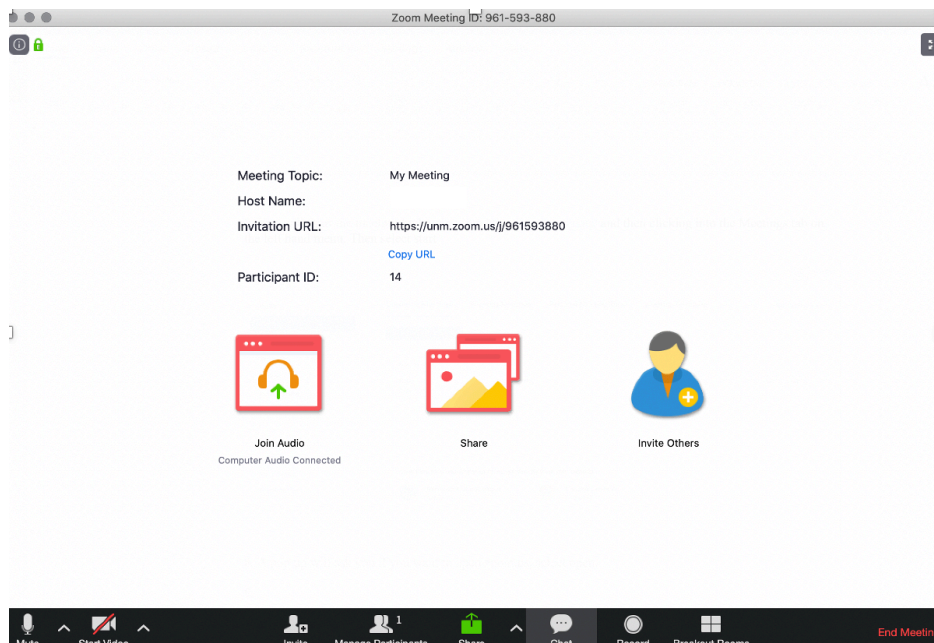
7. You will Start the meeting by logging into <https://unm.zoom.us/> and then clicking into the Meetings tab on the left hand menu. Then select start



8. A pop up will ask you if you want to open zoom.us, select open. A pop up will show connecting to the meeting.



9. From here you will be in the meeting space. You will want to join audio and start video. To trouble shoot: https://support.zoom.us/hc/en-us?flash_digest=b8f211d302e088c940f84a696b1fe718c54e53a8



10. You will know your participant has entered the room by monitoring the participant number at the bottom of the screen. There is no reason to record your session. Once you are done you will end the meeting.

Texting Students

- Advising sessions should not be conducted via texts
- Keep in mind that text messages on your personal device may become part of an educational record.

Social Media

- Use a department account

UNM Student Records Policy

Information on our Student Records Policy may be found at <http://pathfinder.unm.edu/campus-policies/student-records-policy.html>. The following is considered directory information as allowed by FERPA.

- **10.0 Directory or Public Information Categories**

The University, in accord with the Act, has designated categories of information about students as "directory information" which is public unless a student asks to have any or all of it withheld. These categories are:

- Name
- Address (school and permanent)
- Telephone listing
- Electronic Mail Address
- Date of birth
- Major field of study (including current classification, year, credit load and number of academic credits earned toward degree)
- Dates of attendance (matriculation and withdrawal dates)
- Degrees and awards received (type of degree and date granted)
- Most recent previous educational agency or institution attended
- Participation in officially recognized activities and sports, and weight and height of members of athletic teams.

Coronavirus online tools

Emergencies related to severe weather or a health crisis can result in missed class time for students and instructors. UNM recommends the following to keep a main campus or branch class going if you or students can't safely get to class. UNM recognizes that not all students and faculty will be able to access the internet regularly in some emergency contexts; we encourage students and faculty to communicate about possible alternative formats.

Just as you would with a classroom meeting, thinking through communication, assignments, and assessments in an online format will help you provide continuity in an emergency.

- <https://at.unm.edu/coronavirus/>