Mentoring & QC Tools
Tutor.com
November 2006 (Revised August, 2018)
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**Purpose**

The purpose of the Mentoring and QC tools is for Mentors, Senior Mentors and the provider management team to effectively manage the quality of the tutoring sessions delivered to Tutor.com customers and to provide an essential communication link between Tutor.com and tutors.

**Accessing the Mentoring & QC Tools**

**Location**

The Mentoring tools are accessed via a link in the Tutor Classroom. This link is present within the Mentoring section of the Settings and Tools tab and is titled “Mentoring Tools”.

*Note: when new messages arrive, an update is indicated next to the Messages link.*

Alternatively, you can access the Mentoring tools directly at this URL:

http://prv.tutor.com/QualityControl/Login.aspx

**Login**

When logging into the Mentoring tools, you will log in with the same username and password that you use to run the classroom.
Mentoring Tools

The upper left corner of the Mentor review tools contains a collapsible navigation menu for the various Mentoring tool features.

The Quality Control option will list any outstanding QC sessions which remain to be addressed (Additional information about this can be found in the QC Tool section of this manual).

The Advisories option will present you with a table of all open advisories, and in parentheses note how many (if any) advisories currently require your attention. (Additional information about this can be found in the Advisory System section of this manual).

The Mock Sessions option will provide information pertaining to scheduled mock sessions as well as pending requests.

Clicking the link “Requests are pending” will provide the details of the pending mock session requests.

Clicking on the specific appointment will provide details pertaining to that applicant.

The Messages option allows you to send and receive messages from your Senior Mentor.
Also located here will be links to both your tutoring and Mentoring reviews created by your Senior Mentor. (Reviews for your tutoring work can also be found by clicking on the “View My assessments” link in the Settings and Tools page tab of the classroom).

My Reviews are the reviews of your Mentoring work only, completed by your Senior Mentor.

This menu contains several categories, including:

- **To Do** (available to all Mentors)
- **My Tutors** (available to all Mentors and Senior Mentors with tutors assigned to them)

**To Do**

This section includes activities that require the Mentor’s attention before they can be removed. It will include reminders about:

- QC sessions that need to be reviewed and addressed
- Advisories that need to be reviewed
- Reviews/Spot Checks which are due
- Reminders of mock session requests and upcoming mock session appointments

The QC sessions in need of addressing will be in the subcategory of “Quality Control,” which can be expanded to see the list of QC sessions available for review.

The Mentor’s ToDo list will be visible and accessible to the Senior Mentor. The Mentor’s and Senior Mentor’s ToDo lists will be visible and accessible to the Mentor Manager.
My Tutors
This section contains an expandable list of the tutors assigned to the Mentor as well as information pertaining to them.

Clicking on the My Tutors link will open the Mentor Information page. This page contains links that will allow you to query up-to-date information for various aspects of the Mentoring team.

This page provides summary information particular to the Mentoring team.
General Information
This information will be present when the page loads.
- Name
- Email Address
- Months Mentoring

Notes
This is a free text area available for Mentors, Senior Mentors and managers to record notes pertaining to the Mentor’s team, for all members of the Mentoring team to review, including the Mentor, Senior Mentor, and manager.

Review/QC Information
- This is a table that will provide a summary of tutoring activity and QC sessions since the last Review or Spot Check, for each tutor assigned to the Mentor. The table will include:
  - Tutor Name (First name Last name). Note that clicking on the tutor’s name will load the tutor’s Tutor Information Page in the right pane of the tool.
  - Tutor status
  - Days since last review/spot check (if no review has been completed yet, then this will be the number of days since the tutor went from applicant to probationary status)
  - Sessions since last review/spot check (if 1st review has not yet been completed, then this will be the days since the tutor went from applicant to probationary status)
  - Voice sessions since last review/spot check (if 1st review has not yet been completed, then this will be the days since the tutor went from applicant to probationary status)
  - Days since last session
  - QC sessions since last review/spot check. (The total number of sessions that were flagged by one of the QC systems, whether it was marked as not an issue, or addressed with the tutor)
  - Next due for… is the next quality check event that will take place (either Review or Spot Check), based on which event was completed previously (e.g., if a Spot Check was the last event completed, the information in this column will be “Review”).
  - Clicking on a column header will sort the table by the data in that column.
Status Change/Connection Information

This table will include all information necessary to determine if a tutor has achieved the quantitative guidelines for a status change. As a reminder, while we have these guidelines in place to see an overview of a tutor’s quality, status changes should be recommended based on the quality of the tutoring sessions and not only the numbers. The table will include:

- Tutor Name (First name Last name) Note that clicking on the tutor’s name will load the tutor’s Tutor Information Page in a new browser tab.
- Tutor status
- Days since last status change
- Sessions since last status change
- Average rating for the last 6 months
- Online Percentage (For the last 90 days)
  - Font will turn red if the value is below 70%
- Accepted Percentage (For the last 90 days)
  - Font will turn red if the value is below 85%

Clicking on a column header will sort the table by the data in that column.

### Status Change/Connection Information View details

<table>
<thead>
<tr>
<th>Tutor Name</th>
<th>Tutor status</th>
<th>Days since last status change</th>
<th>Sessions since last status change</th>
<th>Average rating for last 6 months</th>
<th>Online Percentage</th>
<th>Accepted Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa</td>
<td>Latin-Hire - Level 1</td>
<td>401</td>
<td>21</td>
<td>73.6 %</td>
<td>100.0 %</td>
<td></td>
</tr>
<tr>
<td>Rafael</td>
<td>Latin-Hire - Level 1</td>
<td>532</td>
<td>35</td>
<td>4.25</td>
<td>62.6 %</td>
<td>75.0 %</td>
</tr>
<tr>
<td>Alan</td>
<td>Tutor.com - Level 1</td>
<td>1877</td>
<td>488</td>
<td>4.17</td>
<td>60.3 %</td>
<td>67.7 %</td>
</tr>
<tr>
<td>Amanda</td>
<td>Tutor.com - Level 1</td>
<td>45</td>
<td>1</td>
<td>4.51</td>
<td>64.7 %</td>
<td>86.7 %</td>
</tr>
<tr>
<td>Andrea</td>
<td>Tutor.com - Level 1</td>
<td>386</td>
<td>70</td>
<td>5.00</td>
<td>100.0 %</td>
<td></td>
</tr>
<tr>
<td>Ashley</td>
<td>Tutor.com - Level 1</td>
<td>686</td>
<td>293</td>
<td>4.13</td>
<td>62.3 %</td>
<td>84.1 %</td>
</tr>
</tbody>
</table>
**Recommended Actions**

This table provides all members of the Mentoring team with the actions that were recommended for a tutor in the most recent Review or Spot Check completed. This table will include:

- Tutor Name (First name Last name) Note that clicking on the tutor’s name will load the tutor’s Tutor Information Page in a new browser tab.
- Tutor Status
- Date that most recent event (Review or Spot Check) took place.
- Event that took place most recently
- Recommendation selected during the Review/Spot Check for action to be taken

### Recommended Actions View details

<table>
<thead>
<tr>
<th>Tutor Name</th>
<th>Tutor status</th>
<th>Date</th>
<th>Event</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roder</td>
<td>Tutor.com - Level I</td>
<td>06/13/2018</td>
<td>Spot Check</td>
<td>Complete next review as scheduled</td>
</tr>
<tr>
<td>Kelly</td>
<td>Tutor.com - Probationary</td>
<td>06/13/2018</td>
<td>Review</td>
<td>Complete next review as scheduled</td>
</tr>
<tr>
<td>Nadine</td>
<td>Tutor.com - Level I</td>
<td>06/12/2018</td>
<td>Review</td>
<td>Complete next review as scheduled</td>
</tr>
<tr>
<td>Kimberly</td>
<td>Tutor.com - Level I</td>
<td>06/11/2018</td>
<td>Spot Check</td>
<td>Complete next review as scheduled</td>
</tr>
<tr>
<td>Ashley</td>
<td>Tutor.com - Level I</td>
<td>06/11/2018</td>
<td>Review</td>
<td>Complete next review as scheduled</td>
</tr>
<tr>
<td>Unea</td>
<td>Tutor.com - Level II</td>
<td>06/07/2018</td>
<td>Review</td>
<td>Discuss recurring quality issues with my Senior Mentor</td>
</tr>
</tbody>
</table>

**Team Ratings Information**

This table will contain information pertaining to the individual monthly ratings for each tutor on the team. The table will include:

- Tutor Name (First name Last name) Note that clicking on the tutor’s name will load the tutor’s Tutor Information Page in a new browser tab
- Tutor status
- Rating for the current month (rating across all subjects the tutor is approved for)
- Ratings for each of the prior 6 months (one column for each month)
- Clicking on a column header for Tutor Name or Tutor status will sort the table by the data in that column.

### Team Ratings Information View details

<table>
<thead>
<tr>
<th>Tutor Name</th>
<th>Tutor status</th>
<th>Jun-18</th>
<th>May-18</th>
<th>Apr-18</th>
<th>Mar-18</th>
<th>Feb-18</th>
<th>Jan-18</th>
<th>Dec-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michelle</td>
<td>Latin-Hire - Level I</td>
<td>4.00</td>
<td>5.00</td>
<td>4.00</td>
<td></td>
<td></td>
<td></td>
<td>4.00</td>
</tr>
<tr>
<td>Rafael</td>
<td>Latin-Hire - Level 1</td>
<td>4.00</td>
<td>5.00</td>
<td>4.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alan</td>
<td>Tutor.com - Level I</td>
<td>3.50</td>
<td>5.00</td>
<td>4.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amanda</td>
<td>Tutor.com - Level I</td>
<td>4.57</td>
<td>4.50</td>
<td>4.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Andrea</td>
<td>Tutor.com - Level I</td>
<td>5.00</td>
<td>5.00</td>
<td>3.70</td>
<td>5.00</td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ashley</td>
<td>Tutor.com - Level I</td>
<td>5.00</td>
<td>5.00</td>
<td>3.70</td>
<td>5.00</td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Expanding the "My Tutors" folder should display the tutors assigned to the Mentor.

Selecting a particular tutor will display the Tutor Information Page in the right pane.

**Individual Tutor Information Pages**
Clicking on the name of a particular tutor will open the Tutor Information Page for that tutor. This page contains links that will allow you to query up-to-date information for various aspects pertaining to that tutor.

**General Information**
This information will be present when the page loads.

- Screen Name (how the tutor’s name is displayed in the classroom)
- Name
- Email Address (clickable mailto link)
- Status
• 6 month average rating
• 12 month average rating
• Average session length since last Review
• Average session length (unlimited) since last Review
• Subjects
• Voice Approved

### General Information

<table>
<thead>
<tr>
<th>Screen Name:</th>
<th>Erik O</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>Tutor.com - Level I</td>
</tr>
<tr>
<td>Avg. Rating 6 Months:</td>
<td>4.5</td>
</tr>
<tr>
<td>Avg. Rating 12 Months:</td>
<td>4.5</td>
</tr>
<tr>
<td>Avg. Session Length Since Last Review/Spot Check:</td>
<td>22:57</td>
</tr>
<tr>
<td>Avg. Session Length (unlimited) Since Last Review/Spot Check:</td>
<td>63:20</td>
</tr>
<tr>
<td>Subjects:</td>
<td>English - Essay Writing</td>
</tr>
<tr>
<td>Voice Approved:</td>
<td>True</td>
</tr>
</tbody>
</table>

Should the Voice Approved option say “FALSE,” you should assume that the tutor has gone through the process to be exempt from using voice. You should NOT reach out to the tutor and direct them on how to get voice approved.

### Tutor Notes

• A free text area available for Mentors to record notes about the tutor. Information which should be included here is (but not limited to):
  o Date tutor moved to your team
  o Date advisories issued, reasons for Advisory, date follow-up review to be conducted.
  o Misc. information such as dates of vacations or other short leaves
  o Any concerns or information about or from the tutor that your Senior Mentor, Mentor manager or new Mentor (should the tutor be transferred) should be aware of.

Always be sure to initial and date the entries so everyone is aware of whom the comment was left by. This information is editable at any time by Mentors, Senior Mentors, and managers.
**Status Changes**

- Dates of status changes for tutors as available

**Ratings and Sessions**

This table will include monthly ratings and session count information for the current month and the previous 6 months. These ratings/session counts will be in the following categories:

- Overall
- LHH
- Consumer
- Subject Ratings (1 row for each subject tutored)

**Sessions: Total & QC**

This table will provide a summary of the number of QC sessions addressed with the tutor, for the current month, and previous 6 months. Each QC issue noted will be displayed on a separate row.

The table will also include a row that will track the number of times a tutor goes at least 5 minutes beyond the maximum session length for the session.
When a tutor exceeds the maximum session length for a session by 5 minutes or more, a system email will be sent to the tutor. Each time one of these emails is sent, it will be noted in the “Max Session Length Exceeded” row of this table.

**Review/S揖t Check Issues Noted**

The page will display the following information:

- Date Review/S揖t Check was completed – for previous 8 events
- Each date when clicked will load the corresponding Review/S揖t Check into the workspace. Review scores are given for each review. (Note that Spot Checks will not have a score assigned to them)
- Each row will contain one quality issue, and if present in the assessment, an “X” will be included in the corresponding box on the table.
- The Grey rows indicate the issues that may be noted as a concern in a Spot Check.
  - An “X” will appear in this row if 2 or more sessions are identified during the Spot Check as having a concern in that area.
  - The exception to this is Content. An “X” will appear in this row even if only 1 session is noted as having a content concern.
- The White rows are the issues that may be noted as a concern in the Review.
  - An “X” will appear in this row if an issue was marked as “Below Expectations” on the Review form.

<table>
<thead>
<tr>
<th>Review/S揖t Check Issues Noted View details</th>
<th>3/3/2017</th>
<th>3/3/2017</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Review</td>
<td>SpotCheck</td>
<td></td>
</tr>
<tr>
<td>Score</td>
<td>2.47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates familiarity with basic concepts in approved tutoring subjects</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates content knowledge in sessions conducted</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates effective written language skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates effective oral language skills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides clear explanations and ensures student understanding</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approach</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifies the needs of the student</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifies the student’s level of understanding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creates interactive learning experience with the student</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilizes an effective approach, able to change as necessary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoids doing too much work for the student</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensures student understanding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides positive reinforcement to build student confidence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates professional behavior</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Management</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates time management efficiency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilizes tools &amp; resources effectively</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brings sessions to an educationally sound conclusion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manages voice technical issues efficiently</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conducts voice sessions in a professional environment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Connection Information

This table will show the following information for the current month, as well as the previous 6 months:

- **Hours Scheduled** - # of hours scheduled by tutor for the month
- **Scheduled online %** - Tutor’s % of time online during scheduled hours.
- **% of time voice enabled** – the % of time the tutor is enabled while available to students.
- **Session requests** – # of session requests received
- **Accepted** – # and % of times tutor selected the option to “Accept” the session request (regardless of whether the classrooms connected).
- **Missed or Declined** – # and % of times the tutor either A) did not accept the request within the time provided and the request timed out OR B) the tutor selected the option to “Decline” the request.
- **Cancelled** - # and % of the times the request was cancelled, by either part, once the session request had been accepted.
- **Tutor Failure** - # and % of the times the tutor’s classroom failed to load after accepting the session request.
- **Connected Sessions** - # and % of the times the classrooms successfully connected.
- **Crashed Sessions** - # and % of the times the session disconnected abruptly during the session (most often due to technical issues).

<table>
<thead>
<tr>
<th></th>
<th>Jun-18</th>
<th>May-18</th>
<th>Apr-18</th>
<th>Mar-18</th>
<th>Feb-18</th>
<th>Jan-18</th>
<th>Dec-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours scheduled</td>
<td>24</td>
<td>37</td>
<td>53</td>
<td>45</td>
<td>29</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>Scheduled online</td>
<td>87.6%</td>
<td>67.4%</td>
<td>84.0%</td>
<td>87.8%</td>
<td>86.3%</td>
<td>89.4%</td>
<td>81.9%</td>
</tr>
<tr>
<td>% of time voice</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session requests</td>
<td>6</td>
<td>19</td>
<td>21</td>
<td>18</td>
<td>9</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Accepted</td>
<td>3</td>
<td>50.0%</td>
<td>9</td>
<td>47.4%</td>
<td>12</td>
<td>57.1%</td>
<td>13</td>
</tr>
<tr>
<td>Missed or declined</td>
<td>3</td>
<td>50.0%</td>
<td>9</td>
<td>47.4%</td>
<td>8</td>
<td>38.1%</td>
<td>5</td>
</tr>
<tr>
<td>Cancelled</td>
<td>1</td>
<td>4.8%</td>
<td>1</td>
<td>4.8%</td>
<td>1</td>
<td>4.8%</td>
<td>1</td>
</tr>
<tr>
<td>Tutor failure</td>
<td>3</td>
<td>50.0%</td>
<td>9</td>
<td>47.4%</td>
<td>12</td>
<td>57.1%</td>
<td>13</td>
</tr>
<tr>
<td>Connected sessions</td>
<td>3</td>
<td>50.0%</td>
<td>9</td>
<td>47.4%</td>
<td>12</td>
<td>57.1%</td>
<td>13</td>
</tr>
<tr>
<td>Crashed sessions</td>
<td>1</td>
<td>16.7%</td>
<td>1</td>
<td>5.3%</td>
<td>1</td>
<td>4.8%</td>
<td>3</td>
</tr>
</tbody>
</table>

Calculations

% Tutor Failure:

\[
\frac{\text{Tutor Failure}}{\text{Total Requests - (Missed/Declined + Cancelled)}} \times 100
\]

% Crashed:

\[
\frac{\text{Crashed Sessions}}{\text{Accepts - Cancelled}} \times 100
\]
% Total Failure: \[ \frac{Tutor\ Failure + Crashed\ Sessions}{Requests - Missed/Declined} \times 100 \]

- % Total Failure is not in the table but can be calculated based on the data available.

While there are no concrete values in this data which will definitely identify a content issue, these are some averages for the tutor base as a whole you can use to compare to your mentees to determine if a connection issue may be occurring.

<table>
<thead>
<tr>
<th>Average %</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg % of Total Failures</td>
<td>6.53%</td>
</tr>
<tr>
<td>Avg % of Crashed Sessions</td>
<td>3.63%</td>
</tr>
<tr>
<td>Avg % of Tutor Failures</td>
<td>3.09%</td>
</tr>
<tr>
<td>Avg % of Student Failures</td>
<td>0.83%</td>
</tr>
<tr>
<td>% of tutors that experience 0% Tutor Failures</td>
<td>79.30%</td>
</tr>
<tr>
<td>% of tutors that experience &lt; 10% Tutor Failures</td>
<td>91.00%</td>
</tr>
</tbody>
</table>

A simple Excel table is available in the Tutor Resource Area (called "Connection Info Calculator" in which you can add several months of numbers from the table to determine the percentages over a period of up to

**Session Decline Information**

This table will show information pertaining to the number of requests received and declined, as well as the percentage of sessions declined for the current month and the previous 6 months.

<table>
<thead>
<tr>
<th>Session Decline Information</th>
<th>View details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Jan-10</td>
</tr>
<tr>
<td>Math - Algebra II</td>
<td>63</td>
</tr>
<tr>
<td>Math - Statistics</td>
<td>10</td>
</tr>
<tr>
<td>Math - Trigonometry</td>
<td>23</td>
</tr>
<tr>
<td>167</td>
<td>15</td>
</tr>
<tr>
<td>41</td>
<td>9</td>
</tr>
<tr>
<td>18</td>
<td>2</td>
</tr>
<tr>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td>14</td>
<td>1</td>
</tr>
<tr>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>13</td>
<td>2</td>
</tr>
<tr>
<td>21</td>
<td>5</td>
</tr>
<tr>
<td>35</td>
<td>8</td>
</tr>
</tbody>
</table>

**Voice Decline Session Information**

This table will show information pertaining to...
- Requested - the # of requests for voice sessions that were declined while the voice tool was enabled, and that # as a % of the # requested.
- *Connected (voice not used)* - the # of voice sessions requested that connected, but in which voice was not used, and that # as a % of the # requested.
- *Voice Used* - the # of voice sessions in which voice was used, and that # declined as a % of the # requested.

### Voice Session Decline Information

<table>
<thead>
<tr>
<th></th>
<th>Oct-17</th>
<th></th>
<th>Sep-17</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested</td>
<td>4</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Connected (voice not used)</td>
<td>4</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Voice Used</td>
<td>0</td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

### Session Transfers Since Last Review/Spot Check

This table will show a breakdown (by subject) of the number of sessions transferred since the last Review/Spot Check, and the reason noted for the transfer.

### Sessions Since Last Review

Clicking this link will open a table of all sessions completed by this tutor since their last review, including voice sessions (marked with “Y”) if they exist. This table will open in a new window.

- Note that sessions which the Mentor addressed within the QC system will not be on this list since they were previously addressed, but are available in the QC sessions folder.

This table can be sorted by the various categories listed.
The Max Session/Review Time column will include information based on the type of session.

- If the session is an Async session with a maximum review time, that time will be displayed (e.g., 35, 50, 80 mins).
- If the session is an on-demand session with a maximum session length, that time will be displayed (e.g., 180 mins).
- If the on-demand session is unlimited, or if it is a limited institutional session, then the column will be blank. However, good judgement should always be exercised. Excessively long sessions should be addressed and discouraged as they historically can lead to mental fatigue.

The Voice Session Comment will be populated with a numerical value based on the use, or lack of use, of the voice tool in the session. The possible values and what they represent are:

-1 : Voice not enabled for this client
0 : Voice enabled for this client, but not requested
1 : Voice enabled and requested, but not connected
2 : Voice enabled, requested, and connected, but not used
3 : Voice enabled, requested, and connected, but only one party used
4 : Voice enabled, requested, connected, and used by both parties

**Declined and Transferred Sessions (Last 3 Months)**

Clicking this link will invoke a list of session requests over the last 3 months for which the tutor declined the request or transferred the session. This table will open in a new window. Information included in the table will consist of:

- Request time and date
- Voice Session (a blank indicates that it was not a voice session)
- Subject
- Grade Level
- Initial question asked by the student prior to requesting a tutor
- Reason for the decline or transfer
• Comments
• Session Transcript (available for transferred sessions only)

This table can be sorted by the various categories listed, except Session Transcript.

<table>
<thead>
<tr>
<th>Request Time</th>
<th>Subject</th>
<th>GradeLevel</th>
<th>Question</th>
<th>Reason</th>
<th>Comments</th>
<th>Voice Status</th>
<th>Session Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15/2017 01:38 PM</td>
<td>Math - Algebra</td>
<td>9th</td>
<td></td>
<td>VOICE - Hardware difficulties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/15/2017 02:36 PM</td>
<td>Math - Algebra</td>
<td>9th</td>
<td>linear equations</td>
<td>Shift</td>
<td>[00:03:12] Mike D. (Tutor): My shift is up in 2 mins!</td>
<td>1</td>
<td>Session Transcript</td>
</tr>
</tbody>
</table>

For Async sessions in which Maximum review times apply, this information will be included in the “Question” column at the end of the question text.

<table>
<thead>
<tr>
<th>Request Time</th>
<th>Subject</th>
<th>GradeLevel</th>
<th>Question</th>
<th>Reason</th>
<th>Comments</th>
<th>Voice Status</th>
<th>Session Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/07/2018 01:54 AM</td>
<td>Async - English - Essay</td>
<td>College - Intro</td>
<td>PreSession details: <a href="http://lh.tutor.com/AsyncHelp/PreSessionDetails?Endpoint=ir=async://5b91b9e0-29-5ed6-4d96-a303-55d6a9d7f6a5.Document">http://lh.tutor.com/AsyncHelp/PreSessionDetails?Endpoint=ir=async://5b91b9e0-29-5ed6-4d96-a303-55d6a9d7f6a5.Document</a> to review. <a href="http://lh.tutor.com/SharedSessionFiles/0fcf240b-eed6-4f68-860d-170702693010_conclusion.docx">http://lh.tutor.com/SharedSessionFiles/0fcf240b-eed6-4f68-860d-170702693010_conclusion.docx</a> Maximum review time: 35 minutes</td>
<td>Shift</td>
<td>My shift ends in 5 minutes and the async session is 35 minutes.</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**Voice Disabled Information**

This section provides information for the number of times a tutor disabled the voice tool each month, and for what reason.

**Scheduled Session Information**

This section shows the number of scheduled sessions the tutor has completed.

Expanding information for all of these categories on this page will result in the page displaying all the information pertaining to a particular tutor on the Mentoring team. If the page is left to view
another page in the Mentoring tool, the categories will have to be selected again and a new query will run. The speed at which these queries run will depend on a number of factors, including by not limited to available RAM, processor speed, ISP, etc.

**Tutor Activity Information**

This section provides information pertaining the tutor’s online activity.

- **Hours available (floating)** – total hours (waiting and in session) for which the tutor was floating (does not include time during scheduled hours).
- **# of days available** - the number of days during the month that they were online and available to students

<table>
<thead>
<tr>
<th>Hours Available (floating)</th>
<th>Jun-18</th>
<th>May-18</th>
<th>Apr-18</th>
<th>Mar-18</th>
<th>Feb-18</th>
<th>Jan-18</th>
<th>Dec-17</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.31</td>
<td>4.22</td>
<td>7.08</td>
<td>13.27</td>
<td>2.37</td>
<td>7.29</td>
<td>7.32</td>
</tr>
</tbody>
</table>

Expanding a tutor’s name in the navigation tree will reveal several subcategories.

**Send Message**

Click on this will open a message box to allow you to send a message to this tutor.

**Reviews/Spot Checks**

Expanding this menu item will grant Mentors access to previously completed Reviews/Spot Checks as well as the ability to start a new Review/Spot Check.
**Advisories**

If there is at least one open Advisory on the Mentor’s team, the link for Advisories will be available. Opening this link will provide access to a table with a summary and status of all currently open advisories.

**QC Sessions**

Expanding this menu will provide access to past QC sessions that have been addressed with the tutor. The previous 6 months’ worth of sessions will be available. The sessions will be listed under subcategories for the QC function that they were addressed in (filtered sessions, comments, etc.)

**Tutor Flagged Sessions**

These are sessions that the tutor has flagged for further review by the Mentor. Sessions since the last Review/Spot Check was completed will be available for review.

**Past Sessions**

This category will contain all sessions completed for the previous 6 months. Sessions are organized by Month and Date, and listed according to the time the session was completed.

**Reviews**

Reviews are used as a means to provide regular, structured feedback and communication to tutors to provide them with the information and suggestions to conduct high quality sessions that meets the educational needs of the students.

Expanding this menu item will grant Mentors access to previously completed Reviews/Spot Checks as well as the ability to start a new Review/Spot Check.
To complete a review, Mentors will click on the New Review link. Doing so will open up a blank review form in a new window.

**General Information**

The top of the Review form contains general information about the tutor, including:

- Name and Status
- Date review started (started on) and last updated (submitted on)
- Average student rating for the last 6 months
- Accepted % for the last 3 months
- Sessions completed (since Review/Spot Check)
- Name of Mentor completing review

**Feedback to Tutor**

The main portion of the form consists of categories and subcategories that Mentors will evaluate and note if the overall quality of the work being completed in each area is below expectations, meets expectations, or exceeds expectations (additional definitions of these ratings below). For each subcategory, Mentors can also select up to two illustrative sessions from the drop-down menus; sessions in which voice was used are marked with “[v]”. In the right-hand box, mentors can include brief comments about the session(s) selected from the drop-down menus.

These are the main areas of evaluation that have the largest impact on the overall quality of a session. These include...

- Content
- Communication
• Approach
• Time Management
• Policies & Procedures

If there are concerns in either subcategory under Content, select the subject in which the tutor appears to be having difficulty with content. Should there be multiple subjects in which concern is being noted, select the subject that is of greatest concern. The other subjects of concern can be noted in the free text areas of the Review form.

The Comments section is used to summarize the overall quality of the tutor’s work for the Review period, and invite the tutor to contact you with any questions or comments.

**Recommendations**
In this section Mentors will select the recommended course of action to take following the review.

As a result of this review, which of the following actions will you take:
- Discuss a status change with my Senior Mentor
- Discuss recurring quality issues with my Senior Mentor
- Discuss an Advisory with my Senior Mentor
- Complete next review as scheduled

**Internal Comments**
This section is for Mentors to leave additional information pertaining to the quality of the tutor’s work. Information included in this section will be visible only to the Mentoring team, not the tutors.
At any time during the Review, the Save button can be hit and the work done to that point will be saved for future completion.
After a Review is started, but before it is completed, the review will be red and bold to signify that the Review has not yet been posted.

Once the Review is completed, the Submit button should be pushed to post the Review and send the tutor a message that the Review has been completed. When you do, this message will be presented. Selecting “OK” will post the Review and notify the tutor.

Previously completed Reviews are stored for the Mentor after completion, as the tutor will see them, and are read-only.

**Spot Checks**

A new Spot Check can be initiated by clicking on the New Spot Check link

Selecting this Link will open the Spot Check Form. The top of the form contains information similar to the Review form and includes:
The first step of the Spot Check process involves an analysis of the quantitative data on the Tutor Information Page. Detailed information about how to review this information is available in the Mentor Resource Manual. Following an analysis of the quantitative information, a determination is made on the Spot Check form.

- If no concerns were noted during the analysis of the quantitative data, the option for "No Issue Found" should be marked. No review of sessions is necessary, and the Mentor can move to the recommendation portion of the form.

- If concerns are noted following the analysis of the quantitative data, the "Issue Found" should be marked. Selecting this option will open a new section of the form where Mentors can complete a random selection and review of sessions to determine if the hypotheses formed during the analysis of the quantitative data are supported.

**Session Review**
Up to 4 sessions can be selected for review. Voice sessions are not to be reviewed during Spot Checks, and will not appear in the drop down list of sessions. From the drop-down list, the Mentor will be able to see the following information about the session prior to clicking the link to open the transcript:
- Time/Date
- Subject
• Session Length
• Rating (if left by student)

Having this information will allow the Mentor to identify sessions that may give further information to support the hypothesis generated during the analysis of the quantitative data. For example:

• If it was noted that the tutor had an exceptionally high decline rate in a specific subject, the Mentor may want to focus on sessions in that subject area to check for adequate content knowledge.
• If a very high rating was noted, the Mentor may want to look at sessions that have high ratings and lower session length times...which could be an indication of a lack of student engagement.

It is important to remember that while the Mentor will have all sessions available that were completed since the last Event, this process should be one that is as much as possible a random review of sessions. Sessions can be selected based on their parameters if they might support the hypothesis developed during the analysis of the quantitative data, but Mentors should not look through all sessions in an effort to specifically find a session with concerns. The purpose of this Spot Check is a quick check of information to ensure we do not have a recurring egregious concern that would warrant completing a full review.

<table>
<thead>
<tr>
<th>Sessions Spot Checked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transcript</td>
</tr>
<tr>
<td>Session #1</td>
</tr>
<tr>
<td>Session #2</td>
</tr>
<tr>
<td>Session #3</td>
</tr>
<tr>
<td>Session #4</td>
</tr>
</tbody>
</table>

Note: "Yes" means evidence of a quality concern was noted.

**Recommendations**
The final portion of this form is the recommendation. This is information that will be saved in the Mentoring tools so all members of the Mentoring team are aware of the recommended actions and appropriate discussions can take place.
The 3 recommendations available include:

- Discuss a status change with me Senior Mentor (this option should be selected if the tutor is demonstrating high quality work that is consistent with the next status level and has completed an adequate number of sessions since the last status change to determine that the quality is consistent and sustainable).

- Discuss completing a formal review with my Senior Mentor (this option should only be selected if concerns with the quantitative information and sessions that were reviewed suggest a concern with recurring quality issues). Remember to email your Senior Mentor alerting them of this recommendation.

- Complete the next review as scheduled (this option should be selected if no status change is being recommended, and no recommendation for a formal review is being selected. This is the option that likely will be chosen the majority of the time during these Spot Checks).

Once you have completed the Spot Check, you should include any comments pertaining to your findings in the Internal Comments field and then select the Submit option. You can save a Spot Check at any time by selecting the Save option should you need to pause the work you are doing so you can come back to it at a later time.

**QC Tools**

**To Do List**

The top level of the Navigation control has a “To Do” option.
Expanding the To Do option will display a “Quality Control” option. The Quality Control option contains sessions that require your review for the tutors on your team. Each session that requires review is displayed with the caption “Session Review [date]” where [date] is the date on which the session occurred. Clicking on one of these entries will load the session review page.

**Session Review**

The purpose of the review is to check a session for potential problems with one of your tutors. If you feel that the tutor was responsible for conducting a bad session, it is your job to give the tutor feedback about how they can do better in the future.

The process for the review of Filtered sessions, Low Rated sessions, sessions with bad Student comments and Session Credit Requests all use the same interface and will be discussed as a group.

**Session Review Screen**

The session review screen is divided into 4 areas:

- **Session Details**
- **Review Actions**
- **Audit Log**
- **Session Transcript**
Session Details

The session details appear in the upper left. If the details do not fit in the space provided a vertical scroll bar should appear allowing you the scroll through the content that extends past the border of the area.

Session Details
QC Flags: Comment Review
Tutor:
Student/Program: Southeastern University
Market Type: Higher Ed
SessionId: 13155881
Session Start Time: 2/21/2017 6:14:02 PM
Session Mins: 12.1 - Unlimited
Student Comments: Wasn't able to assist
Tutor Comments: David Frazier: bond payments after tax. Too much for me without a serious refresher.
Grade: College - Intro
Subject: Business - Intermediate Accounting
Student Rating: No Rating
Student Recommends: No Recommendation
Achieved Understanding: Neither agree nor disagree (3)
Prerequisite Knowledge: Neither agree nor disagree (3)

QC Flags

This field lists the categories in which the session has been flagged for review. A session may be flagged for review for multiple reasons. The flag which is highlighted in yellow is the category you are currently reviewing the session for.

Tutor

This field contains the full name of the tutor that was in session. If the session was transferred, each tutor in the session will be listed here. The tutor who the session is being reviewed for will be highlighted in red.

Student/Program

This field displays the name of the account holder or the name of the institution the student was using.

Session ID

This is the unique numeric identifier of the session.

Session Start Time

This field displays the date and time at which the session began.

Session Mins
This field displays the length of the sessions in minutes.

**Student Comments**  
This field displays the comments the student left in the post session survey.

**Tutor Comments**  
This field displays the comments the tutor left in the post session survey.

**Grade**  
This field displays the grade level selected by the student in the pre-session survey.

**Subject**  
This field displays the subject selected by the student in the pre-session survey.

**Student Rating**  
This field displays the rating the student left in the post session survey.

**Student Recommends**  
This field displays the subject selected by the student in the pre-session survey.

**Achieved Understanding**  
This is the question tutors are asked to rate the level of understanding of the concepts/material discussed at the time the session ends.

**Prerequisite Knowledge**  
This is the question tutors are asked to rate the level of pre-requisite knowledge necessary to discuss the concepts/material involved at the time the session begins.

**Review Actions**  
The Action Area is where you will decide what should be done with this session.
You have three actions you can choose from.

**Not an Issue**
This option should be selected by default. If, after reviewing the session, you decide that no further action is required then simply click the “Go” button. The session will be marked as not requiring further review and it will be removed from the system. The next session will be loaded automatically for you. If there are no more sessions the system will give you a message indicating that all the sessions have been reviewed.

Please note that *Notify Tutor.com should be selected if you do not agree with the issues noted by the initial reviewer.* Sending the session to Tutor.com along with your reasons for why you feel this session did not contain an issue of concern that needs to be addressed with the tutor will allow for an additional perspective on the situation so the most appropriate course of action can be identified. The only exception to this is if the only issue of concern noted in the session is possible content concerns. We rely on the Mentors to make the judgment call regarding content concerns, as the members of PM are not familiar with the concepts involved with every subject we offer. If you should have a question about content, you are welcome to copy and paste the session and email it to your Senior Mentor for further review prior to submitting the QC session to the tutor.

**Issue**
The Issue option should be used when you identify that there is a problem with the session. Selecting the Issue choice will activate the rest of the controls in the Review Actions area.
The next choice you need to make is who should be notified about the session. You have two choices, the tutor (Notify Tutor) or a Mentor manager (Notify Tutor.com). The former should be used in the majority of situations the latter should be used for major tutor transgressions that require immediate action by Tutor.com. You must choose to notify either the tutor or the Mentor manager. Most of these major transgressions will be identified during the initial review process. But should you come across one that you feel Tutor.com should be notified of, please choose Notify Tutor.com. We prefer that Mentors err on the side of caution when making these decisions. Should you have a question about how to handle a specific situation you can select Notify Tutor.com for feedback.

The next field, Issue Type, should be used to classify what the problem with the session was. Selecting an issue type from the list is required. Should there be more than one issue to be addressed, please select the most serious issue. Additional issues should be noted in the comments section, as well as noted in the information you send to the tutor. The list of issues for the types of session reviews is:

**Filtered Session:**
- Tutor Profanity
- Student Profanity
- Tutor Solicited Contact Information
- Tutor Provided Contact Information
- Student Provided Contact Information
- Tutor was Rude
- Tutor Mishandled Troubled Student
- Inappropriate Website
- Inappropriate Sex Ed
- Other

**Low Rated Session:**
- Inadequate Clarification
- Concept Errors
- Contact Information
- Unprofessional Behavior
- Gave Answer
- Tutor Passed on Session
- Pace of Session
- Poor Approach
- Inappropriate Website
- Poor Tone
- Poor Ending
- Inadequate for Understanding
- Improper Handling of Troubled Student
Other Policy Issue

**Comment Reviews:**
- Tutor Profanity
- Tutor Solicited Contact Information
- Tutor Provided Contact Information
- Student Provided Contact Information
- Tutor Passed on Session
- Tone
- Dead Time
- Unprofessional Comments
- Tutor Mishandled Troubled Student
- Inappropriate Website
- Inappropriate Sex Ed
- Other
- Pacing
- Approach
- Unclear Explanation
- Poor Clarification
- Poor use of websites
- Failure to follow Direct policies

**NOTE:** In the Comment Review issues list, there are some issues in Red. The issues in red are only used for Individual Account Holder Comment reviews, and **NOT** for LHH Comment reviews.

The next field, Message to Tutor, should contain the message you wish to deliver to the tutor about the session. The text entered here will be delivered to the tutor along with a copy of the session transcript.

The final field, Comment, should be filled out by you to indicate what, in your own words, you feel was the issue with the session and how you resolved it.

Clicking the “Go” button now will send this session to either the tutor or the Mentor Manager. The next session will be loaded automatically for you. If there are no more sessions the system will give you a message indicating that all the sessions in this category have been reviewed.

**Audit Log**

The purpose of the Audit Log area is to display who has already reviewed this session and what actions they took.
The data in the review area contains the following:

**Date**
This field contains the date time a previous reviewer saved their review of this session.

**Reviewer**
The field contains the name of the person who previously reviewed the session. *Note:* Reviewers of the sessions should never be contacted. If you should have any questions, the Notify Tutor.com option should be selected.

**Classified**
This field contains the Issue Type the person who previously reviewed the session chose.

**Action**
This field indicates the action chosen by the person who previously reviewed the session.

**Assignment**
This field shows who the session was delivered to after it was saved by a previous reviewer.

**Is Content Correct?**
**Is Content In Scope?**
These two questions pertain to the results of a session review should a student express concern that the tutor provided incorrect content.
Comments
This field contains the comments entered by the previous reviewer.

Session Transcript
This area displays the entire session transcript. A vertical scroll bar should appear for transcripts that exceed the length of the display area. The transcript contains the chat history, all white boards used in the session and clickable links for websites visited and files shared.

Options available for session review include:

1. **Print Transcript** – to print the chat log and corresponding whiteboards
2. **Replay Session** - to review the session in real time, as if you were in the session too, and see the timing of various aspects of the session. This can be a very useful feature in that sometimes, information is erased from the boards, or if there is a long gap in the chat log and you are unsure if work is being done on a whiteboard, or perhaps to get a better sense of who is doing what on the whiteboard. However, it is not a feature that will need to be used when reviewing every session. Some tips to keep in mind include:
   a. This feature should only be used when you simply cannot tell for sure what is taking place in the session and you are confident that seeing the session play out will provide you with missing details about what took place.
   b. You should increase the replay speed to 5x. It is easy to follow at this speed, while not taking as long to wait for each response.
   c. Since you do not have the ability to fast forward or rewind at this time, you should determine where the point of interest you need to view will occur, based on the time stamps in the chat log. (Note that the time stamps are not available
in the chat log as it replays, but the total time elapsed can be seen in the timer at the top of the classroom). This will allow you to work on other things while the session runs to the point of interest.

If the session is one in which Voice is used, there will be several other options available:

1. **Review Audio of Voice Session** – This launches the audio player that allows you to listen to the audio portion of the session.

2. **View Voice Session Transcript** – to view the transcription of the voice portion of the session.

Please be sure to review the Mentor Manual for information pertaining to when the audio file should be listened to.

**Content Expert Review**

The Reviewer Action area is slightly different for the review of Session Credit Requests by a content expert. You may occasionally receive these requests as part of the Session Credit Request process. If you do receive one of these requests, it will be for a session in a subject that you are approved to tutor in. Correct content is essential for every Tutor.com tutoring session. Students with individual accounts occasionally request credit for a session in which they question the validity of the content. Prior to making a decision on the credit request, subject experts review the content...
to determine whether the information provided by the tutor was correct. It is important that you provide clear and succinct information as this information may be shared with the customer. If the information provided by the tutor was incorrect, the credit request will be granted.

The actions Skip and Not an Issue are not available. Your only option here is to return the session to Tutor.com. The expectation is that you will provide the initial reviewer with information concerning the “correctness” of the information the tutor gave to the student during the session.

You should simply enter your opinion on the content of the session in the Comments box and click Go to return the session to the initial reviewer.

**Advisory System**

The advisories tool allows all communication pertaining to advisories to take place within the Mentoring tools, with all discussion visible to the Mentor, Senior Mentor and manager. Within this system, Mentors will be able to...

- submit Advisory recommendations
- monitor Advisory status, progress, and review dates
- communicate with Mentor team members about the Advisory
- note progress being made by the tutor during the Advisory period

It will also allow both managers and Senior Mentors to approve, issue, and implement resolutions for advisories issued to tutors. The system allows for internal communication between all members of the Mentoring team as necessary. Below are the instructions for the use of this feature within the Mentoring Tools. Additional procedural information is available in the Mentor Resource Manual.

The link to create a new Advisory for a tutor will be located in the navigation tree for the tutor, under the link to begin a new Review/Spot Check.
Clicking on the "New Advisory" link will launch the Advisory request form that the Mentor will complete.

**Tutor Advisory Form**

The form will populate the following information when opened:

**General Information**
- Name & Status of Tutor
- Date Advisory was created
- Date the Advisory last updated (submitted to Senior Mentor)
- Name of Mentor recommending the Advisory

**Areas of Concern**

The following check boxes can be selected to indicate the issues of concern to be included in the Advisory. Note that these boxes are consistent with the categories in the Review form.
Areas of Concern

Content
☐ Inability to communicate with basic concepts in approved tutoring subjects
☐ Does not demonstrate content knowledge in sessions conducted

Subject #1
Select...

Subject #2
Select...

Subject #3
Select...

Communication
☐ Ineffective written language skills
☐ Ineffective oral language skills
☐ Unclear explanations

Approach
☐ Ineffective identification of the needs of the student
☐ Ineffective identification of student's level of understanding
☐ Lack of student engagement
☐ Ineffective approach utilized
☐ Unable to change approach
☐ Not ensuring student understanding
☐ Demonstrates inappropriate tone or behavior

Time Management
☐ Ineffective pacing
☐ Paces sessions between responses
☐ Ineffective use of tools & resources
☐ Sessions too short
☐ Sessions not brought to sound conclusion

Other
☐ Misbehaved Troubled Student
☐ Unprofessional Comments in Survey
☐ Excessive Declines or Disabling of Voice
☐ Sporadic Tutoring
☐ Other

Mentors are now able to choose the subject(s) for which the tutor has demonstrated concerns with content knowledge.

The Excessive Declines concern also includes Disabling of Voice.

Message to Tutor
This is a free text field where mentors enter the actual text/body of the Advisory. See Mentor Resource Area for Advisory Templates. Note that this window can be resized by clicking and dragging the lower right-hand corner.

Message to tutor

P
Internal Review Only
Information in this section is visible only to the Mentor team, not to the Tutor.

Advisory Status
- Active – pending (this is the only option available to Mentors at the time the warning is created)

Advisory Period
- 1 week
- 2 weeks (this is the standard warning period)
- 3 weeks
- 4 weeks

Comments
- Open text field (these are for internal use only communication among the members of the Mentoring team – this is where the Advisory and Termination request templates would be copied and pasted to – See Mentor Resource Area for templates.

Sent To
- Senior Mentor

Creating the Advisory Request
- Selecting New Advisory under the tutor’s name on the navigation tree will open a new Advisory form to be completed.
- Note the check boxes for the areas of concern (this should be no more than 4)
- “Message to Tutor” free text box will contain the warning message the tutor will receive. (The available templates are located in the Mentor Manual).
  - **Note** Due to possible formatting issues, it is important to copy the Advisory template to a plain-text editor prior to pasting it into this form (i.e., do NOT paste directly from Word into the Advisory form).
    - In the Programs list on the computer, select Accessories and then Notepad. (You may want to create a desktop shortcut to this program for easy access).
    - Once open, copy the Advisory template to Notepad to ensure the text is in plain-text format.
    - Copy the text from Notepad into Advisory form.
    - Format as necessary here similar to how you would when completing a review.
- In the “Internal Review Only” section...
  - select the recommendations for the length of the Advisory period
in the comments box, paste the Advisory recommendation template (located in the Mentor Manual) after it has first been copied to a plain-text editor (this section replaces the previously used Advisory Request Form)

**Submitting the Advisory Request**

When the form is completed, a Mentor has the choice of either “Saving” the form for future edits, or “Sending” the Advisory -- at which point it will be forwarded to the Mentor’s Senior Mentor for review.

Advisories that have been saved, but not yet created (i.e., sent to the Senior Mentor) appear in the user-interface in bold-red font:

- **Advisories**
  - 3/3/2017
  - New Advisory

Once the Advisory request has been sent to the Senior Mentor, by selecting the Advisory link in the ToDo list, the Mentor will be able to track the current status of, activities on, and review date for the Advisory.

### Open Advisories

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Last Update</th>
<th>Tutor</th>
<th>Tutor Status</th>
<th>Status</th>
<th>Open By</th>
<th>Issued By</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/3/2018</td>
<td>6/7/2018</td>
<td>Jazell</td>
<td>Tutor.com - Level I</td>
<td>Active-issued</td>
<td>Alison</td>
<td>Ashley</td>
</tr>
<tr>
<td>6/7/2018</td>
<td>6/8/2018</td>
<td>Utica</td>
<td>Tutor.com - Level II</td>
<td>Active-issued</td>
<td>Alison</td>
<td>Ashley</td>
</tr>
<tr>
<td>5/3/2018</td>
<td>6/12/2018</td>
<td>Madeline</td>
<td>Tutor.com - Level I</td>
<td>Active-issued</td>
<td>Alison</td>
<td>Ashley</td>
</tr>
</tbody>
</table>

Once an Advisory request is submitted to the Senior Mentor, there are several actions that the Senior Mentor may take.

*Return for Further Discussion*

Should the Senior Mentor have questions or concerns to address before approving the Advisory, the Comments section allows a discussion between Mentor, Senior Mentor, and if necessary, manager to take place. These comments are internal only, and will not be seen by the tutor.

*Advisory Not Approved*
When a pending Advisory is rejected, the Senior Mentor sends it back to the Mentor to inform him/her of the Advisory’s closure and to communicate any feedback regarding the rejection. The Mentor is alerted to a rejected Advisory in the To Do > Advisory area. After the Mentor has reviewed it, the Mentor can add any internal comments that might be necessary. The only Advisory status available at this time is “Archive.” By selecting “Save” and then “Send” the Advisory will be removed from the list of Open/Pending advisories, but will still be available in the navigation tree.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>User</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/3/2017</td>
<td>Active-pending</td>
<td>Test Mentor1</td>
<td>Advisories recommended</td>
</tr>
<tr>
<td>3/3/2017</td>
<td>Closed-never issued</td>
<td>Test SeniorMentor1</td>
<td>Recent sessions reviewed note improvement. Let's see how things look following the next Spot Check.</td>
</tr>
</tbody>
</table>

**Sent to Manager**
If additional information or feedback is needed to make a decision, the Senior Mentor can send the Advisory request can be sent to the manager for comments.

**Advisory Issued**
Once approved, the Senior Mentor will confirm the Advisory and a notice will be sent to the tutor (similar to the way a tutor receives a notice of a Review being completed).

<table>
<thead>
<tr>
<th>Date</th>
<th>From</th>
<th>Message</th>
<th>Advisory Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/01/2017</td>
<td>3:17:34 PM</td>
<td>Official Advisory</td>
<td>1 week</td>
</tr>
</tbody>
</table>

When the tutor selects the message, s/he will see the Advisory that was issued in read-only format.

**Reviewing an Advisory Status**
The QC tool will display an alert to Mentors for tickets that require their attention.

At this point, the Mentor will review the Advisory, and recommend a course of action. The possible recommendations from the drop-down list of Advisory Statuses would be:
• Closed-lifted pending (to recommend lifting the Advisory)
• Active-extended pending (to recommend an extension)
• Closed-terminated pending (to recommend termination)

The Mentor will include his/her supporting data for the recommendation in the Comments free-text area.

The recommendation is then sent to the Senior Mentor (the only recipient available) for review by selecting the Send button. It is not necessary to select Save prior to sending, but saving often is always a beneficial practice. The next steps to be taken by the Senior Mentor will depend on the course of action agreed upon.

• The Advisory is lifted. The Senior Mentor will send the notice of this to the tutor and close the Advisory.
  o A notice will be sent to the Mentor so the Advisory can be archived.
• The Advisory is extended. The Senior Mentor will send the notice of this to the tutor and the status of the Advisory will now indicate that the Advisory is in Active – Extended status and a new timetable for review will be listed.
• Recommendation for termination is made. The Senior Mentor will send the request to the manager for final approval. If in agreement the Advisory will remain in Active – Terminated pending status until the decision is communicated to the tutor. Once done, the manager will close the Advisory and it will be removed from the list of Open/Pending advisories.

***IMPORTANT NOTE*** When an Advisory is issued or extended, a notice is sent only to the Tutor at that time. It is very important that Mentors are monitoring the list of active advisories regularly to ensure awareness of all activities pertaining to them.