

Quick Start Guide for Navigate

GETTING STARTED

1. Log in to Navigate using your SSO credentials! Once logged in, links below will take you directly to the Help Center with How-to steps, videos, and best practices.

Training site URL: <u>https://buffalostate.campus-training2.eab.com/</u> - available for training/practice only

- 2. Configure Availability and Calendar for Appointment Scheduling
- **Set Up Your Availability** This is an important first step that will allow you to then create appointments with students by selecting the 'Add Time' from your Staff home screen see *Appendix A* for detailed instructions on setting up your Availability.
- <u>Sync Your Calendar</u> This initiates the two-way sync between Navigate and your calendar. See Appendix B for detailed instructions.

KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communicate With, and Support Students (Please note these features are permission-based at your institution)

- Reference the <u>Student Profile</u> After clicking on a student's name through the search results, your Staff Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student's profile
- <u>Mass Email and Text</u> a Group of Students Use 'Send a Message' from the 'Actions' drop-down to contact your advisees or other lists you've created in the platform see Appendix C
- Add <u>Appointment Summary</u> Reports or <u>Notes</u> Record your interactions and follow-ups from student meetings by adding an Appointment Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting) – see Appendix D
- Create a <u>Progress Report</u> or <u>Issue an Alert</u> to initiate Alert interventions. Staff will intervene based on level of interventions – see *Appendix E*
- **Create an <u>Appointment Campaign</u>** Use this to invite students set up an appointment during times you have designated see *Appendix F*
- Build an <u>Advanced Search</u> Use Saved Searches and Lists to create your own caseload of students through student population filters – see *Appendix G*

Need Help? Access EAB's Help Center

Visit the Navigate Help Center for articles and how-to instructions on all Navigate Features and Workflows.

Fall 2019 💌	۹ ? 🔿 -
Resources & Support	×
Release Information	>
Search for Help Articles	>
Help Center & Support Links	>
Submit a Ticket	>

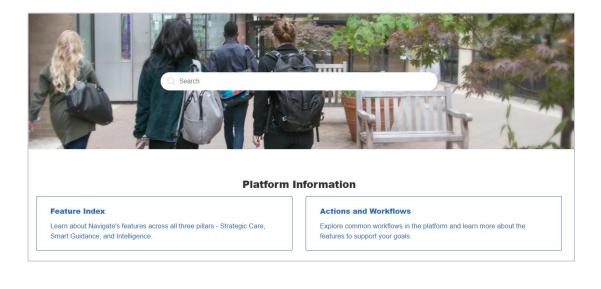
Accessing the Help Center -

Step 1: Log in to Navigate

Step 2: Click on the question mark icon in the top right-hand corner.

Step 3: Click Help Center & Support Links from the drop-down menu

Step 4: Select Help Center to be taken to articles and step by step instructions for Navigate features and workflows. View the <u>Help Center Overview Video</u> to get the most from its resources!



Tip:

Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)



For more detailed guidance, check out the <u>Help Center</u>!

Additional Questions? Email <u>hudsonrj@buffalostate.edu</u> for support!

New Features in Navigate

You can expect to find a few new or enhanced features in your Navigate site, which will improve functionality and processes.

Feature	Description
Care Units	An entity in Navigate, which allows specific groups on campus the ability to support students with customized appointment scheduling, reporting, and access to data with decision support.
Student Campaigns	Student Campaigns allow staff to reach out to specific student populations in bulk and encourage them to schedule appointments (Appointment Campaigns), enroll on time (Enrollment Campaigns) or take other specific actions (Messaging Campaigns). See Appendix F.
Staff Dashboard	This dashboard is designed to give you at-a-glance, actionable information about students who are assigned to you and an overview of ongoing and recent activity.
Student Mobile App	Navigate Student is a dynamic mobile platform that provides intelligent, tailored guidance to help students succeed. Students can schedule appointments, browse targeted content like Resources and To-Dos, view their Class Schedule, join Study Buddies, fill out your institution's Intake Survey, and so much more! Navigate Student allows push notifications for high priority items.
Student Lists	From Advanced Search, users can create static student lists, which appear on their Staff Home. You can use these lists in a variety of ways, from sending messages, initiative appointment campaigns, or issuing alerts.

Starfish to Navigate Migration – Key Feature Glossary

Navigate feature links lead to the Navigate Help Center. You must be logged in to Navigate and have Help Center permissions to access these links.

Starfish Feature	Navigate Feature
Home Page	Staff Home & Staff Dashboard
Success Network	Student Success Network
Staff Assignments	Relationship Types
Send a Message to a Student (Email, 1-way	<u>Send a Message (Email, 1 or 2-way Texting),</u> <u>Messaging Campaigns</u>
Texting)	Appointment Scheduling (Care Units, Locations,
Schedule Meetings/Group Sessions	Services)
Office Hours	<u>Appointment Scheduling (Care Units, Locations,</u> <u>Services</u>)
Event Attendance	Kiosk (Record Visit)
Kiosk	Kiosk
Travel Letters & Study Hall: Self-Service Kiosk	Travel Letters & Study Hall
Meetings Report (appointment) or Activity Report (kiosk activity)	Appointment Summary Report
Notes	Notes
Kudos - Positive feedback	Alerts (Positive)
Flags – Manual Flags	Alerts (Negative, Neutral)
Flags – System Flags	Automated Actions
Flags - Student-raised ("Raise Your Hand")	Hand Raise
Tracking Item – To-Dos	<u>To-Dos & Events</u>
Tracking Item - Referrals	Alerts (Neutral)
Success Plan	Staff To-Dos, To-Dos & Events (Now called Checklist), Alerts
Intake Form	Intake Survey, Surveys
Service Cards	Resources
Progress Survey	Progress Report
Starfish Help	Help Center
Student Folder (view information)	Student Profile (view information)
Filters	Advanced Search Filters
Attributes, Cohorts & Organizations (automated from SIS)	Categories & Student Lists
Attributes, Cohorts & Organizations (manually assigned in Starfish)	Tags & Student Lists
Reports	Reports
Macros	Analytics Dashboards*
	Available dependent on modules purchased

Appendix A: Setting Up Your Availability

Availability

As a new user, the first thing you need to do is <u>set up availability</u> so that students can schedule appointments to see you. It is important to note that locations and services are created by institution administrators.

Staff Home 🔤

Students Upcoming Appointments My Availability

Available Times o

Actions 🗸							
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
0	Mon, Tue, Wed	8:00a-5:00p	Forever	My Advisor's Office	Changes to my Schedule For: Appointments/Drop- Ins/Campaigns	Advising	Edit

MODIFY AVAILABIL	TY		×
Forever			•
Add to your per	sonal availabil	lity link?	
Add this availability to	your personal availab	ility link?	
What type of av	ailability is th	is?	
Appointments	Drop-ins	Campaigns	
Meeting Preference			
× In-Person	× Virtual Meeting)	
Care Unit			
Advising			•
Location			
Academic Advising Cen	ter		•
Services			
× Academic Planning	× Changing a Major	× General Advising	
URL / Phone Number			
Special Instructions for S	tudent		
B $I := \frac{1}{2}$	~ ~		
D 1 •- 2-			
1			
		Cancel	Save
	0/0100		

Add Time -

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days as well as start and end time in the *From* and *To* fields.

Step 3: Set the length of the availability with the *How Long Is this Availability Active?* field.

Step 4: If you want this availability added to your personal availability link, select *Add This Availability to Your Personal Availability Link?* You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff/faculty's chosen availabilities pre-filled. (**Note**: Personality Availability Link only works for regular Appointments, not for Drop-in's and Campaigns)

Step 5: Select your Availability types. You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.

Step 6: For Meeting Preference, select the applicable meeting modality.

Step 7: For Care Unit, select appropriate functional area.

Step 8: Choose the location where you will be available.

Step 9: Select services you can provide students during this availability. You must choose at least one service but can pick more.

Steps 10-14 continued on next page...

Appendix A: Setting Up Your Availability

Will yo	om 23, p	1	← bring p	<i>⇔</i>					
e.g. ro	om 23, p	1	← bring p	<i>⇔</i>					
Will yo	-			•					
Will yo	-			•					
-	ou be	mee							
-	ou be	mee							
-	ou be	mee							
-	ou be	mee							
-	ou be	mee							
-	ou be	mee							
hese setti			eting	wit	h m	ıltipl	e stu	dents	?
	ngs will n	ot be us	sed for I	kiosk ai	nd camp	aign purj	ooses.		
/lax Num	ber of S	tuden	ts per /	Appoi	ntment	:			
1									
									_
								Cancel	s

Step 10: In the URL / Phone Number field, add your meeting link for your appointments.

Step 11: Use the *Special Instructions* box to include additional details for students. (*Example: We will use Zoom for our meeting, which you can access by using the link provided. Virtual meeting spaces allow us the flexibility to connect from various spaces. Please ensure the space you are in is conducive for such a meeting. I very much look forward to meeting with you!*)

Step 12: If you want to hold group appointments, you can specify the number *under Max Number of Students per Appointment.* Otherwise, you can leave is as 1 for one-on-one appointments.

Step 13: Click the Save button.

Step 14: Repeat this process until all your availabilities have been defined.

- You can have as much availability as needed.
- Creating multiple availabilities will enable you to set aside specific blocks for specific services (registration advising for example) or meeting types (drop ins vs. scheduled appointments)

Editing Availability:

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied, and a dialog will open allowing you to make edits or to save your newly created availability.

Delete Time- to delete your time, simply select the time and click the Delete Time button.

Group Appointments - You can create availability for group appointments by indicating how many students are able to schedule into the same appointment (indicate specific number under "Max Number of Students per Appointment")

Inactive availabilities are highlighted in red in the Times Available grid.



Appendix A: Setting Up Your Availability & Target Hours

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31	aff Hor	ne 🔹					
Stur	kenta Appointme	nta My Avail	ability Appoints	ment Queues Appointment	Requests		
Av	ailable Ti	mes					
Act	ons •						
	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK
	Wed, Thu, Fri	8:00am - 11:15pm	Forever	Washington DC	302i-10, SRL-210L, AService with Course For: Appointments/Drop- Ins/Campaigns	Advising Finance & etc.	No
0	Mon, Tue, Wed, Thu, Fri, Sat	8:00am - 11:15pm	Forever	Washington DC	302i-10, SRL-210L, AService with Course For: Appointments/Drop- Ins/Campaigns	Advising Finance & etc.	No
0	Mori, Tue, Wed, Thu, Fri, Sat	8:00am - 11:15pm	Forever	Washington DC	302i-10, SRL-210L, AService with Course For: Appointments/Orop- Ins/Campaigns	Advising Finance & etc.	No
	Mon, Tue, Wed, Thu, Fri, Sat	8:00am - 11:15pm	Forever	Washington DC	302i-10, SRL-210L, AService with Course For: Appointments/Drop- ins/Campaigns	Advising Finance & etc.	No
0	Mon, Tue, Wed, Thu, Fri	9:00am - 6:00pm	Forever	Academic Success Center	Academic Challenges For: Appointments	Advising	No
D	Mon, Tue, Wed, Thu, Fri	8:00am - 5:00pm	Forever	Academic Success Center	Advisor without course(WT) For: Appointments/Drop-Ins	Advising CU	Yes
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	cheduling Ta rget Hours Per We		s 🔶				
1	5 \$						

Schedu	ling Target F	Hours
Target Hou	rs Per Week	
15	\$	
Block	scheduling for the	e week when target is hit
Update	Target Hours	

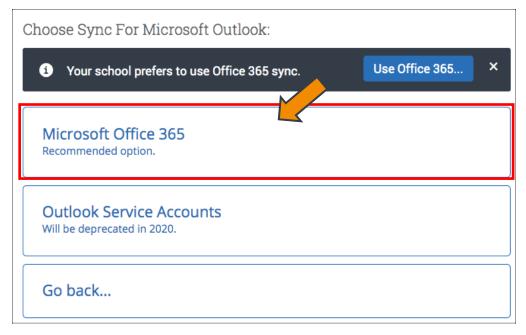
Target Hours allow staff to restrict the number of hours in which they can be scheduled for appointments via Student Scheduler.

- Staff set their Target Hours in the **Scheduling Target Hours** section.
- Target Hours have two aspects:
 - 1. Target Hours Per Week: This is the maximum number of hours per week in which they can be scheduled for an appointment. (You can set this between 1-168 hours.)
 - 2. Block scheduling for the week when target is hit: If selected (and hours have been reached), the staff member will no longer be available to students for appointments for the remainder of the week.
- Note: Target Hours are calculated against all Services, Locations, and Care Units. Your Leadership Team will provide clarification on how this feature should be used.

Integrating Your Calendar

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.

- 1. Toggle to the calendar page within Navigate using the calendar icon on the left side toolbar.
- 2. Select Settings and Sync on the top right side of the page
- Click Setup Sync. You will see a "Your school prefers to use Office 365 sync" banner on Calendar with a "Use Office 365..." button to begin the setup.



- 4. Upon clicking the button, you will be routed to login.microsoftonline.com. If the you are not already signed into Office 365, you will be prompted to sign in.
- 5. After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing "Accept" will authorize and begin the syncing.

Microsoft O	office 365:	
eab_st_o36	5_2@eabdev.onmicrosoft.com	
	C	
	Detra Curre	
	Retry Sync	

The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.

The Two-Way Sync will enable that any agenda item created from Navigate will sync back to your Outlook Calendar. All existing events and events that are created from your Outlook Calendar will be shown as 'Busy' in Navigate

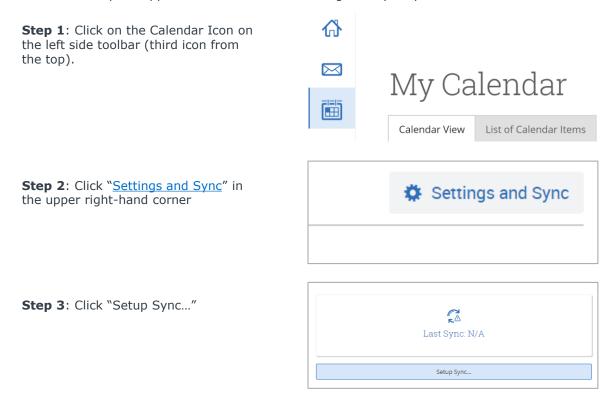


Appendix B: Sync Your Google Calendar

Integrating Your Calendar

PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.



You can now sync your calendar by clicking the "Google Calendar" button. You will be prompted to complete the sync from your Gmail account confirming your request to sync. Click "Allow". You will then be relocated back to Navigate. Click on the drop down for "**calendar for two-way sync**" and select your Gmail address. Finally, click the "Save and Update" button. This should complete your calendar sync. Please log into Gmail to view your calendar and compare it against the calendar within Navigate. You can reach out to your Business Analyst for any technical questions. You can also reach out to your Dedicated Consultant for management and use of the calendar from a functional aspect.

The Two-Way Sync will enable that any agenda item created from the platform will sync back to your Google Calendar. All existing events and events that are created from Google Calendar will be shown as 'Busy.'

Google Calendar		
Other Applications		

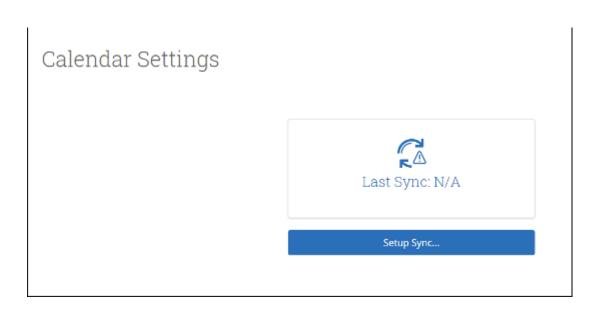
Integrating Your Calendar

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.

Select the calendar icon in the left navigation bar. Once on the My Calendar page, select the **Settings and Sync** button.



On the Calendar Settings page, select Setup Sync...



Integrating Your Calendar

If you see the following screen, click the button that says **Use Office365 (Latest Version)** at the top of the list of options, as in figure 3.

Calendar Settings	Setup	
	Please Choose Your Calendar Application:	
	Your school prefars the latest Use Office 365 (Latest Version) × Office 365 Sync.	
	Microsoft Outlook	
	Google Calendar	
	Other Applications	
	Go back	

If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.

Calendar Settings: S	etup	
	Choose Sync For Microsoft Outlook: Microsoft Office 365 (Latest Version)	
	Microsoft Office 365 (Previous Version)	
	Go back	

Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.

Integrating Your Calendar

	licrosoft an account	
Å	Judy Lee Graph eab_jl_graph@eabdev.onmicrosoft.com Signed in	:
+	Use another account	

If you log in successfully, you see a page requesting permissions.

Microsoft
eab_jl_graph@eabdev.onmicrosoft.com
Permissions requested
EAB Calendar Integration version 2 (Dev)
This application is not published by Microsoft or your organization.
This app would like to:
Maintain access to data you have given it access to
Sign you in and read your profile
✓ Have full access to your calendars
Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. The publisher has not provided links to their terms for you to review. You can change these permissions at https://myappa.microsoft.com.Show details
Does this app look suspicious? Report it here
Cancel Accept

Select **Accept**. The page redirects to the Navigate Calendar Settings page, with a success message and information about the sync on display.

Office 365 connection successful!		×
Calendar Settings		
	Microsoft Office 365 (Latest Version): jlee@eabsupport.onmicrosoft.com	
	Retry Sync	
	Disconnect Sync	

Appendix C: Mass Email and Text a Group of Students

Communicating with Students

Navigate provides both **email** and **text messaging** for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, it allows for a quick and easy way to communicate with more than one student at once.

Any faculty or staff member will only be able to view communications in which they have the proper permissions. Permissions allow users to either view only their own communications with students, or to view all communications with students. If you are unsure who can view your communications, contact your Application Administrator.

How do I send the emails or texts?

You can send emails or texts to one or more students from your staff homepage, the student profile, or the advanced search. Most "Actions" menus throughout the platform allow for sending emails or texts. See below for screenshots of each of these locations.

- Send a message from the Staff home page (fig. 1)
- Send a message from the Student home page (fig. 2)
- Send a message from the Advanced Search (fig. 3)

	Actions 🔺	Staff Alerts 🧿		Actions 🔺	
	Send Message			Send Message	
	Create Appointment Summary	I want to		Create Appointment Summary	ID W
	Appointment Campaign	Message Student		Appointment Campaign	954058983
	Schedule Appointment	Add a Note on this Student		Schedule Appointment	159466807
	Тад			Тад	
	Note	Add a Reminder to this Student		Note	694076931
	Mass Print	Report on Appointment		Mass Print	082564784
	Issue Alert	Create Request for Appointment		Issue Alert	302610444
	Charity			Charity	502010444
	Watch	Schedule an Appointment		Watch	800367062
	Export Results	Add to Watch List		Export Results	501665806
	Show/Hide Columns	lssue an Alert		Show/Hide Columns	
1.1					

Important Note: If you do not see the option to Email or Text students, then your role does not have the proper permission for this action, or your institution decided not to allow texting. Please contact your Application Administrator with questions.

Appendix D: Add Appointment Summary Reports

Documenting a Student Interaction

<u>Summary Reports</u> can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.

Reportin	.g								
Recent Appointments Recent Reports You Created									
Recent Appointments care Unit: All care units									
Actions 🔺	_							S	how Cancelled
Add Appointment S Mark No-Show	ummary	SERVICE	COURSE	COMMENT	ATTENDEE	۰	TIME	REPORT FILED?	DETAILS
		Choosing	N/A		Abdel, Masen		0 min	Not Yet.	Details

For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.

My Assigned Students All Terms 🕶							
Actions							
Send Message Create Appointment Summary	4E	▼ ID	WATCH LIST	CUMULATIVE GPA	♦ SUPPORT ♦		
Appointment Campaign		885975301		0.00	High		
Schedule Appointment		658621590		2.19	High		
Тад		178436157					
Note		196123052	۲				
Mass Print Issue Alert	ianira	538235217		2.96	Moderate		
Charity		999777248		2.12	Moderate		
Watch		609888859		2.79	Moderate		
Export Results		355089613		2.98	Moderate		
Show/Hide Columns					*		
Previous 1 2 3	4	5	29 Next		2,806 total results		



Appendix D: Add Ad Hoc Appointment Summary Reports

Documenting an Advising Interaction

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Reminder: When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments: The primary way to mark a student as a noshow for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.

Staff Alerts 🧕
l want to
Message Student
Add a Note on this Student
Add a Reminder to this Student
Report on Appointment
Create Request for Appointment
Schedule an Appointment
Add to Watch List
Issue an Alert

Important Note: Any information you enter into Navigate pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).



Appendix G: Creating Advanced Searches

Filtering Student Data

Advanced Search lets you create unique cohorts of students based on the layering of search parameters. The search results are used as the foundation for building <u>appointment campaigns</u> or tracking student progress. Queries pull lists of current students that fit the search parameters. Information in the results reflects *current* student data.

Advanced Search uses different logic statements to build queries. Most search filters create **AND** statements. As you build a search, the query identifies students that satisfy all the listed requirements.

Step 1: Click on the magnifying glass on the lefthand side of your home screen to open Advanced Search

New Search							
Saved Searches -							
Keywords (First Name, Last Name, E-mail, Student ID)	Type [?]						
	Students *						
Student Information First Name, Last Name, Student ID, C	Tategory, Tag, Gender, Race, Watch List						
First Name?	Last Name ²	From Last Name?	To Last Name?	Student ID?			
Gender	Race	Watch List (In Any of These)		Transfer Student			
All	All	All		Any			
Category (In Any of these)?							
🛪 Baseball (A1)							
Tag (In Any of these)?							

Step 2: Each filter drawer has a collection of filters. They can be used alone or in conjunction with other filters - both within and across drawers - to build your customized search. Some filter fields need you to enter text; others provide options in a menu. There are three more options at the bottom of the search page to further restrict your search.

Advanced Search uses different logic statements to build queries. Most search filters create AND statements. As you build a search, the query identifies students that satisfy all the listed requirements.

Step 3: Select the current term in Enrollment History to yield the most accurate student data results.

Combine elements of other filters to search for students based on areas of study, including college affiliation, degree, concentration, and/or major.

New Search							
Saved Searches +							
Keywords (First Name, Last Name, E-mail, Student ID) Type ⁷							
	Students						
Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List							
Enrollment History Enrollment Terms							
Enrollment Terms (In Any of these)?							

NOTE: While Advanced Search does not display historical data for students in the resulting list, you can create parameters based on historical conditions.

Appendix G: Saving Student Searches and Lists

Building Dynamic and Static Student Caseloads

Step 4: Once you have selected your specified search fields, click Search. The results display the current information for the students that fit the parameters of your search, which are displayed across the top.

Unsaved Student Search save										
Enr	ollm	ent Terms: Fa	III 2024 x	Majoring In: Biolo	ogy 🗴 Min. Cu	umulative GPA: 2.00) 🗴 Max. Cumulati	ve GPA: 3.00 x	Min. Credits Earned 15	X
	Sea	arch	Modify Search	h						
Actio	ns 🔻									
		NAME 🗢	STUDENT ID 🕈	STUDENT LIST 🗢	CUMULATIVE GPA 🗢	MAJOR 4	PREDICTED SUPPORT \$	CLASSIFICATION \$	CATEGORY	\$
1.		<u>Abbott,</u> Donna	57439028		2.86	Biology,Gender Studies	Moderate	Junior	Commuter student	
2.		<u>Bernal,</u> <u>Karyn</u>	53291847		2.67	Biology	Low	Sophomore	Honors student	
3.		<u>Gonzales,</u> Laura	90634817		2.64	Biology	Moderate	Sophomore	North Hall,Sport - Womens Soccer,Study Abroad - Interest	
4.		<u>Hargrove,</u> Jack	38506297		2.12	Biology	High	Junior	Honors student	

Step 5: From here, you can take a variety of actions:

Saved Searches

- Perform a task via the Actions menu with one, several, or all the students on this list, such as sending a Message, adding to an Appointment Campaign, or creating a Student List. You must select 'All Students' if there are more than 100 results in your search.
- Create a <u>Saved Search</u> by clicking the Save button next to the Unsaved Student Search title. You can also access
 previous saved searches from this page.
 - Saved searches lets users run a pre-configured Advanced Search without having to create the search again. Unlike <u>Student Lists</u>, which save a static list of the same students, a saved search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters
- Modify the search. If you want to add to the original parameters selected, you can select Modify Search to return to the filter drawer view. You can also remove an existing parameter by clicking on the X icon to the right of each of your filter selections.

aved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search riteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.						
Actions -			New Saved Search			
	NAME	USED IN AUTOMATION				
	Transfer1-1.5GPA	Νο				
	Pell Eligible 1st and 2nd Years	Yes				
	Undeclared LAS Students	No				

NOTE: Because some tools in the platform display *all* Student Lists in filters, please use a standard naming convention for your Student Lists that explains the purpose of the list (e.g., F23 Senior His Maj, F24 Transfer 1st Gen). Talk to your Application Administrator if you have questions about the naming conventions for Student Lists at your institution.

Appendix E: Create a Progress Report or Issue an Alert

Submitting a Progress Report

Navigate's <u>Progress Report</u> feature is used by faculty to share critical academic information on students enrolled in their courses. Use the instructions below to submit a Progress Report and mobilize support for a student.

Step 1: Access the Progress Reports either directly from the request email or by logging in to the Navigate platform and toggling to the Professor home page.

Step 2: Click "Fill out Progress Report" from email or home page.

Step 3: In the feedback screen, you will see a list of course sections and students that feedback is being requested for. This may or may not include all the students enrolled in your courses this semester. Begin filling out feedback according to the instructions provided in the Progress Report request email.

Step 4: If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. Please fill out the remaining columns, including the comments section with additional detail that will help an advisor follow up with this student.

Step 5: When submitting your Progress Reports, you have the option to submit only the students you have filled out feedback for or to submit all students. If you choose to submit all students, the students who you have not filled out feedback for will be marked as "I do not have feedback about this student."

	Your information is secure. Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy. Thank you! Professor Wieczkowski: u have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.								
	00-01-LL HUMAN ORIGINS Student Name	ments							
۱ (Class	_ Yes ○ No	Alert Reasons		· · ·				
2	roster –	∖Yes No	Alert Reasons		~				
3	student	⊖ Yes ⊖ No	Alert Reasons		×				
4	last and first name	⊖ Yes ⊖ No	Alert Reasons		~				
5	in st name	⊖ Yes ⊖ No	Alert Reasons		· · ·				
6		⊖ Yes ⊖ No	Alert Reasons		· · ·				

TIP: Use the glossary of Alert Reasons on the next page to understand what follow up action will be associated with each Alert Reason.



For more detailed guidance, check out the <u>Help Center</u>!

Student Feedback

Appendix E: Create a Progress Report or Issue an Alert

Submitting an Ad-Hoc Alert

Navigate's <u>ad hoc alerts</u> are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student.

Step 1: Click the "Issue an Alert" link in the upper right-hand corner of your home page.

Step 2: Search for the student for whom you'd like to issue an

alert (using name or ID).

Step 3: Select the reason(s) you believe the student needs assistance. The reason(s) you choose will connect the student with the appropriate office. See more details

on the specific alert reasons below.

Step 4: If the alert is associated with a particular class, fill out that field.

Step 5: Lastly, please provide any relevant context around your reason for submitting the alert in the comments section. Comments will help the team reviewing alerts to connect the student with the right resources in a timely fashion.

Step 6: Issuing an alert may open a case. You will receive an email notification when the case has been resolved.

-	
Actions	
l want to	
Issue an Alert	

ISSUE AN ALERT			×
Student			Q
Please select a reason for this alert	1		
Is this alert associated with a specific class? Additional Comments	Low Participation Poor Grades		Î
Please enter a comment.	Referral - Tutoring Referral - Counseling Referral - Dean of Students Referral - Residence Life		
	Referral - Study Skills		
		Cancel	Submit



Appendix E: Create a Progress Report or Issue an Alert

Alert Reasons in Progress Reports and Ad-Hoc Alerts

Navigate's Alerts are used by faculty and staff to share critical information and to create referrals for students between support offices. To learn more about Alerts, please read our <u>Alerts & Cases</u> page on our <u>Navigate360</u> website.

