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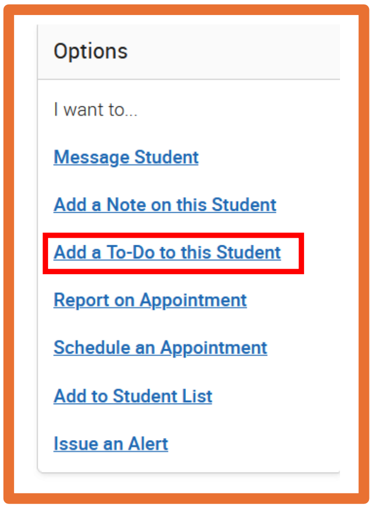
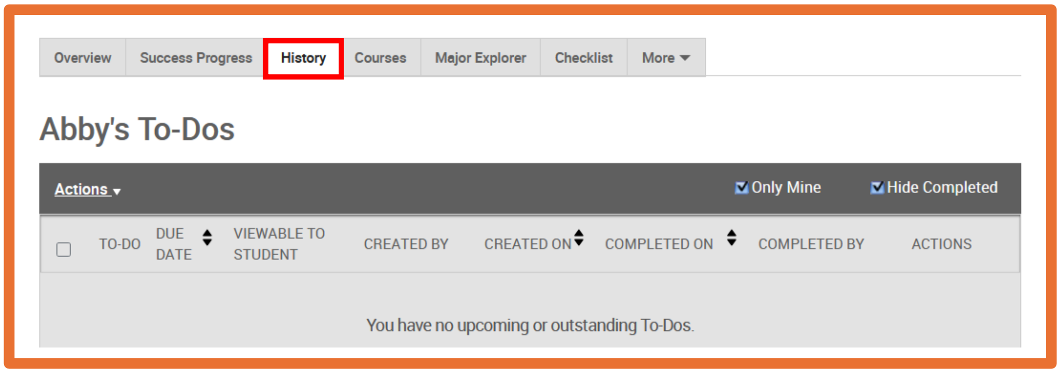
Navigate: Using To Do’s

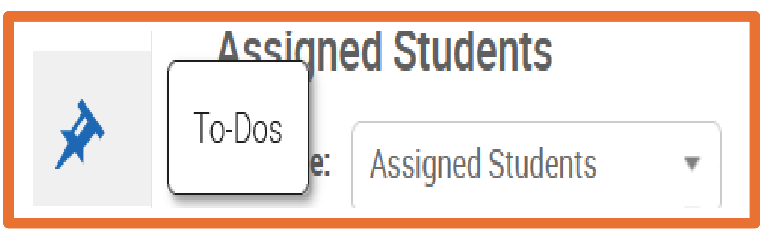
To-Dos prompt a future action regarding a particular student. To-Dos can be used to track next steps or follow up on information shared by the student. These To-Dos can appear in the Student app.

Staff can add To-Dos for themselves about specific students via the **Add a To-Do to this Student** link on the student’s profile page and can view their To-Dos about the student on the **History** tab of the student’s profile.





Staff can view To-Dos for all students via the **My To-Dos** page, accessible to staff by clicking the **Thumbtack icon** in the left-hand navigation pane. A portion of the staff member’s To-Dos are also highlighted directly on their **Staff Home** page in the right hand section below **Quick Links.**



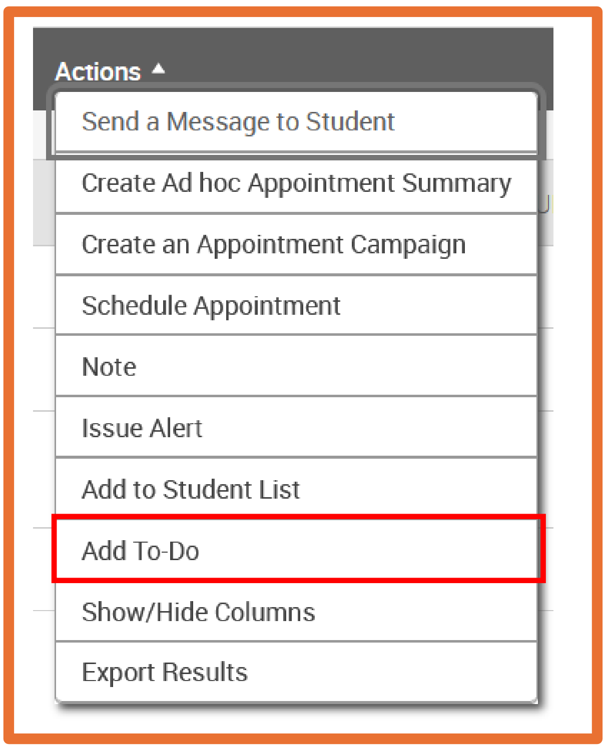
To-Dos allow staff to easily create and view To-Dos about their students. Staff can see other user's To-Dos about their students with the correct permissions and can manage others' To-Dos if given permissions. To see other staff members' To-Dos for students, users need the **Allow Staff to View To-Dos from Other Staff** permission. To manager others' To-Dos, users need the **Allow Staff to Manager To-Dos from Other Staff (Edit, Delete, Complete)** permission.

This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/06/2024]**

Feature Overview

To-Dos are created by staff members in order to prompt a future action regarding a particular student. This can be useful to track next steps for the staff member, to follow up on pertinent information shared during an appointment, or to reconnect with a student at a more appropriate time. For example, you may be working with a student who is having difficulty in a specific course - add a To-Do to check-in on the student's progress after the upcoming midterm exams. Alternatively, the student may be exploring summer internship opportunities - add a To-Do to touch base in a few weeks and find out where they applied.

Staff can quickly add a To-Do via the **Add a To-Do to this Student** link on the Student Profile. Staff can also add a To-Do to multiple students at once by selecting Add To-Do from the **Actions** menu from their **Assigned Students** table, Report Results, an Advanced Search, a Saved Search, or a Student List.



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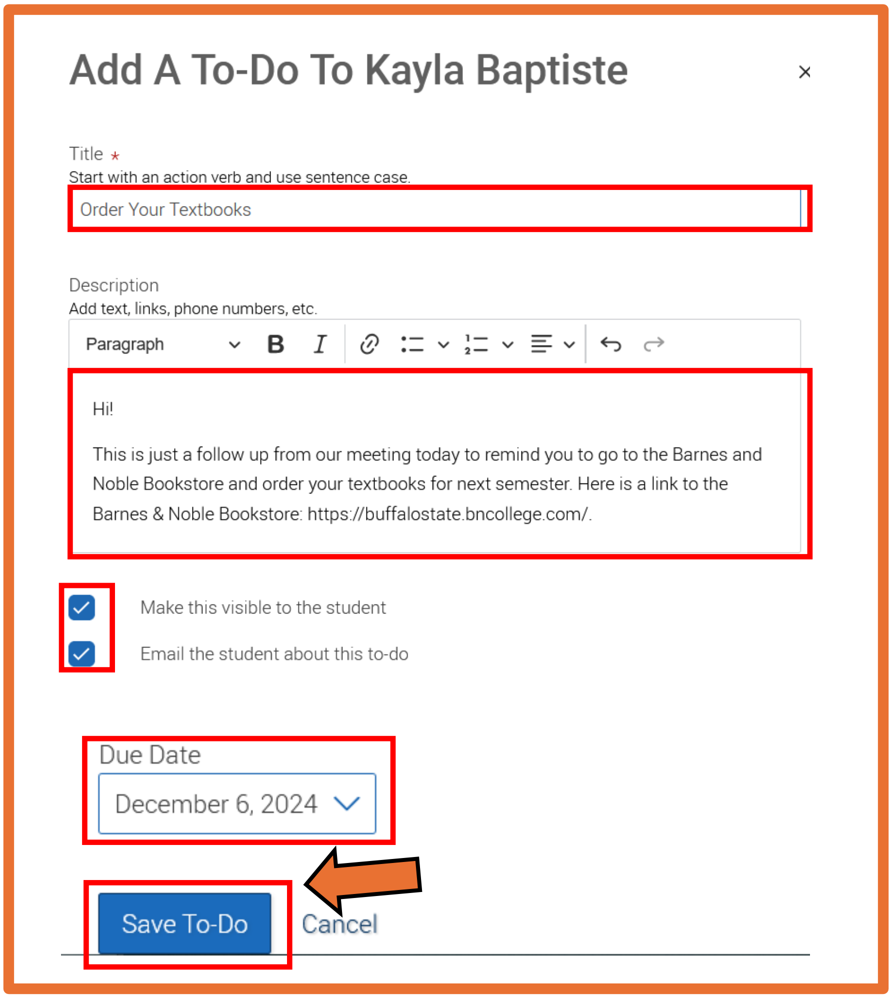
When adding a To-Do, the staff member needs to create a title, which the student sees as the To-Do in Navigate Student. After this, the staff member can add a description with links, text, and other information in the **Description** field.



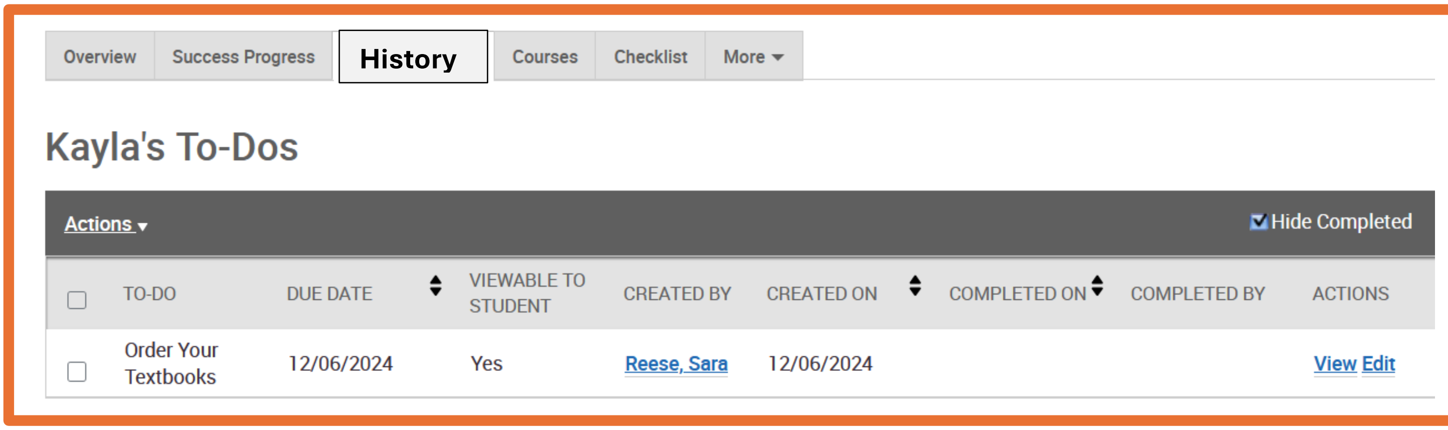
There are two checkboxes a staff member can mark.

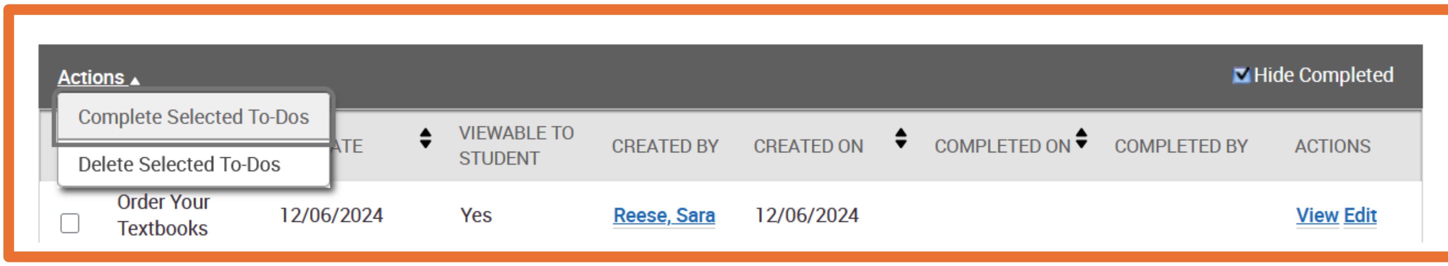
1. Make this **visible to the student**, which makes the To-Do visible and available to the student in Navigate Student.

2. **Email the student about this To-Do** which sends an email reminder to the student about the To-Do, not through Navigate Student notification configurations.

Lastly, staff can add a **Due Date** for the To-Do. This shows to both the staff member and the student if you have made the To-Do visible to the student.

Staff can view their own To-Dos about the student via the **History** tab on the student's profile. You will not see other staff members' To-Dos on the student's profile. The To-Do details—name and due date—can be adjusted by clicking **Edit** next to the specific To-Do. Staff can remove To-Dos that they have completed by selecting **Clear** or **Delete** from the **Actions** menu.

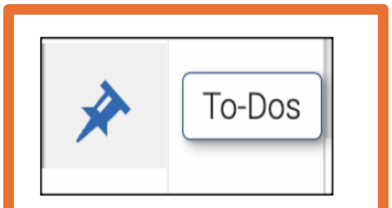




If the staff user has permission, other staff members' To-Dos appear on the History tab in the Student Profile as well.

If the user has the **Allow Staff to Manage To-Dos from Other Staff (Edit, Delete Complete)** permission, they can also take action on the other staff member's To-Do from this page.

While the **History** tab only shows To-Dos for a specific student, staff can also view all of their To-Dos about any student by opening the **My To-Dos** page on the left-hand side of your navigation toolbar.



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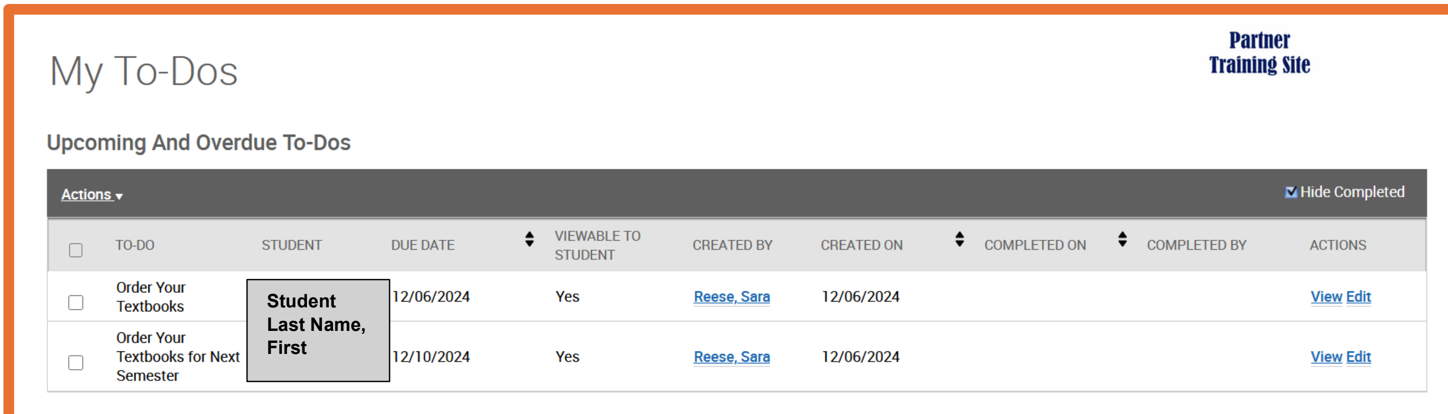
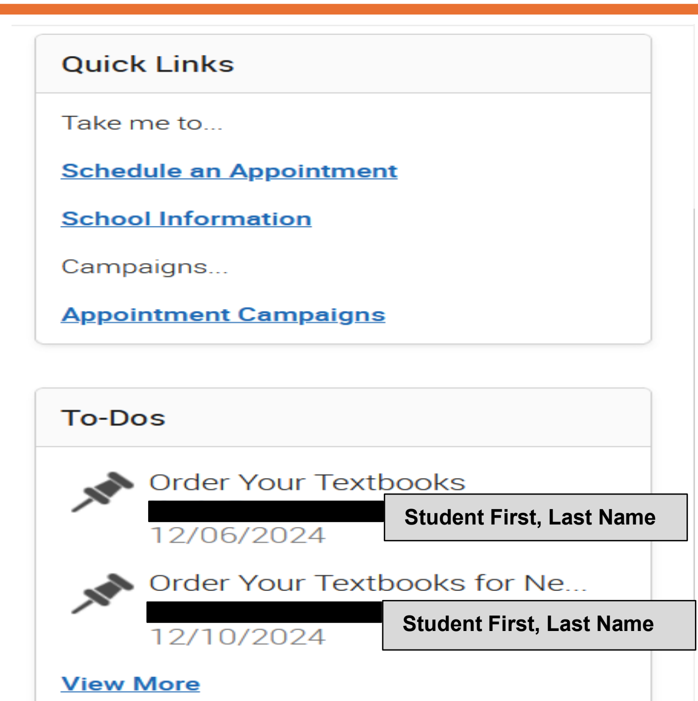
On the **My To-Dos** page, staff see all of their To-Dos, the name of the student associated with each To-Do, and the due date for each To-Do. Through the **Actions** menu, staff can **clear** or **delete** completed To-Dos, and through the **Edit** link next to each To-Do, staff can modify the name or due date for the To-Do. Staff can also view each student's profile by selecting the student's name next to the To-Do.



On the **Staff Home** page, a portion of the To-Dos are highlighted below the staff **Quick Links**. The highlighted To-Dos are those with past or upcoming due dates. Clicking **View More** at the bottom of this section takes you to the **My To-Dos** page to view the complete list of To-Dos.



<u>Note:</u> Once you have taken action on a To-Do, you can remove it from your list using the **Actions** menu.

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