Navigate: Understanding the Student Profile

1. **The Overview Tab**

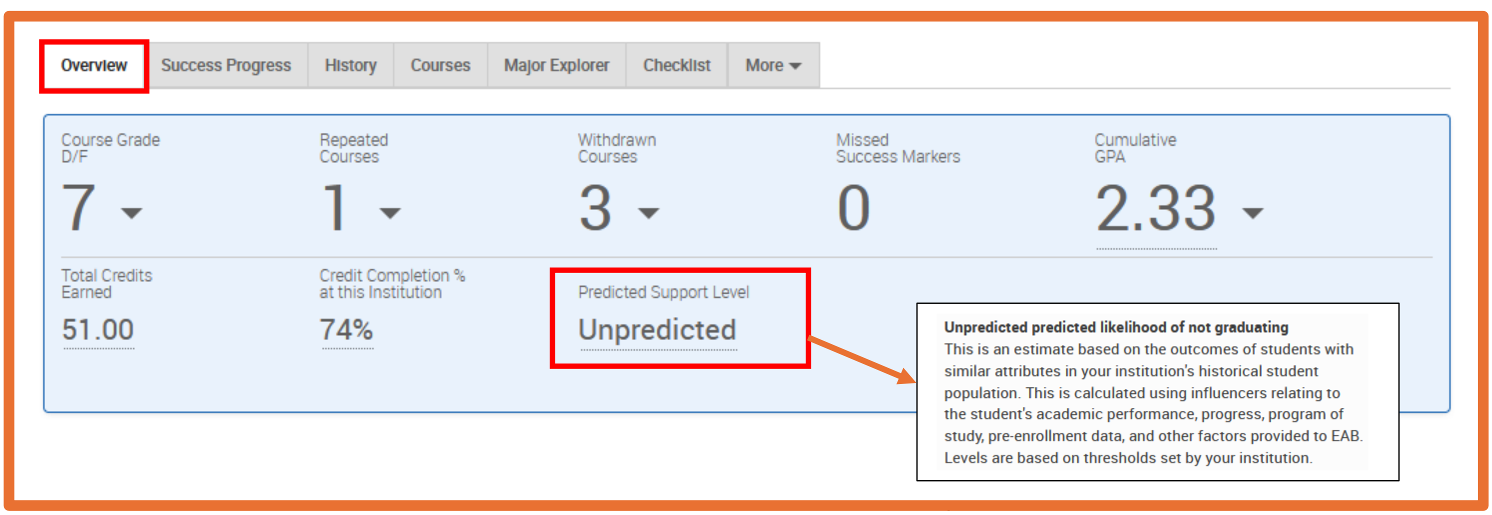
The **Student Profile** shows key details about a student. The Student Profile aggregates all pertinent information about a student into one place. The Overview tab is your go-to spot for a high-level overview of a student's academic performance and progress to date.

The **Overview** is the main tab of the profile. The Student Profiles give staff and faculty quick insight into the student's performance and potential needs. Specific information within the Overview tab, such as the **30-Second Overview**, student IDs, and student categories is also permission-based.

The top light blue box, also known as the 30-Second Overview, offers faculty and staff the opportunity to gather a basic understanding or "gut check" on the student's academic performance to date.

The data includes course performance (number of Ds and Fs, number of repeated courses, and number of withdrawn courses), number of success marker notifications, cumulative GPA, credit performance **(number of credits earned, percentage of credits completed vs. attempted),** and the student's Predicted Support Level – **High**, **Moderate**, or **Low**. Note that when you click on a number in the 30-Second Overview, only the first ten examples will appear.

The 30-Second Overview is intended to surface critical details regarding the student's performance, but the full details related to each datapoint are available in other Student Profile tabs, such as the **Success Progress** and **Courses** information tabs.



This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**

and declared major are also listed on the Overview tab.

Overview

Music
Bachelor of Arts
Arts and Sciences

Student ID
B00895275

Classification
Sophomore

Academic Standing
GOOD STANDING

Most Recent Enrollment
Fall 2024

Goals & Interests (supplied by the student)

Via Navigate Student, there is an additional section outlining the student's **Goals & Interests**, based on the information the student has supplied through the mobile application. This section includes items that the student has favorited within the mobile app (majors, fields, resources, subjects, and activities). This information is populated when a student completes the **My Major Explorer** tool in Navigate. It provides useful insight into a student's priorities and things they enjoy.

Goals & Interests (supplied by the student)

Favorite Majors
None

Favorite Subjects
None

Favorite Fields
None

Favorite Activities
None

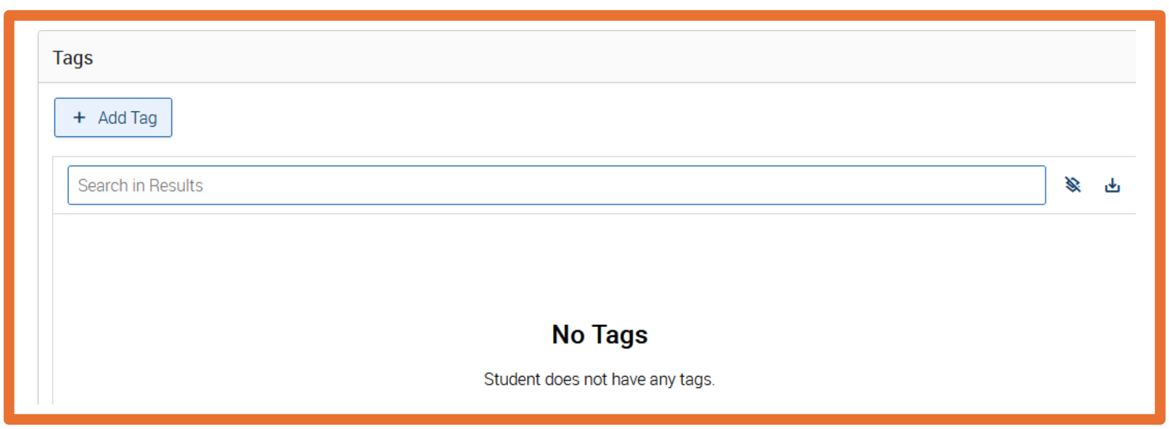
Favorite Resources
None

Categories

The **Categories** section includes a list of all categories associated with the student, depending on the institution's available data. Categories are used to further understand the student's status and potential needs, and often includes academic as well as non-academic information. To name a few, this information can include the following: if the student lives on campus or is commuting, their academic status, if they are an athlete and what sport they play, their Admit term, or if they currently have a hold on their account.

Tags

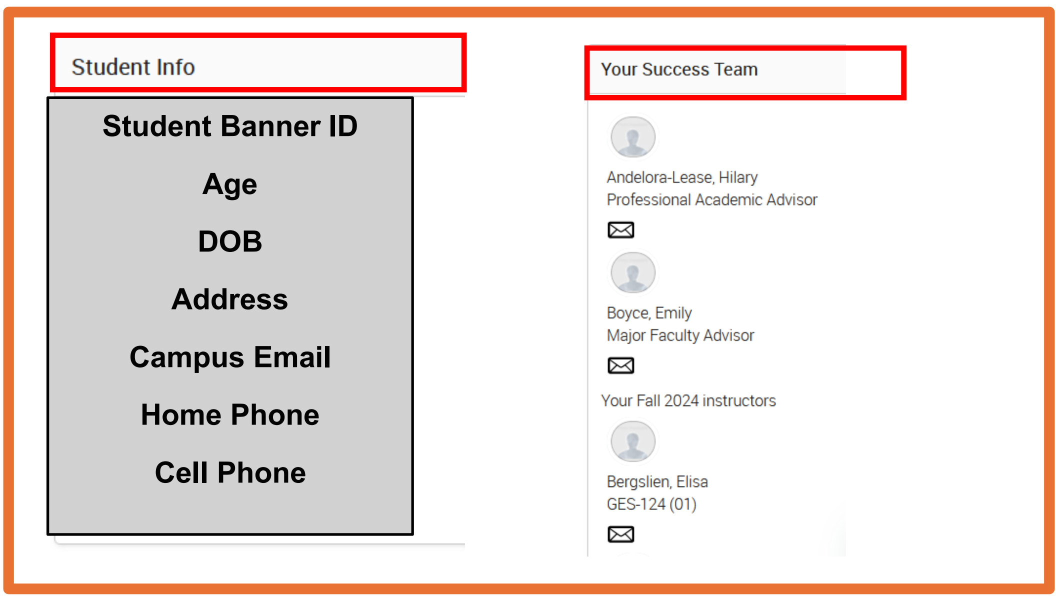
The **Tags** section includes any information that has been manually tagged to the **Student's Profile**. Note that even if you have the ability to view student tags, you may not have permission to assign or remove tags from a Student Profile. Tags can help provide additional information about students that is not typically stored in Banner. For example, a tag may indicate that the student attended orientation, or that they have completed their degree plan. Tags provides another opportunity to target communications to specific groups of students.



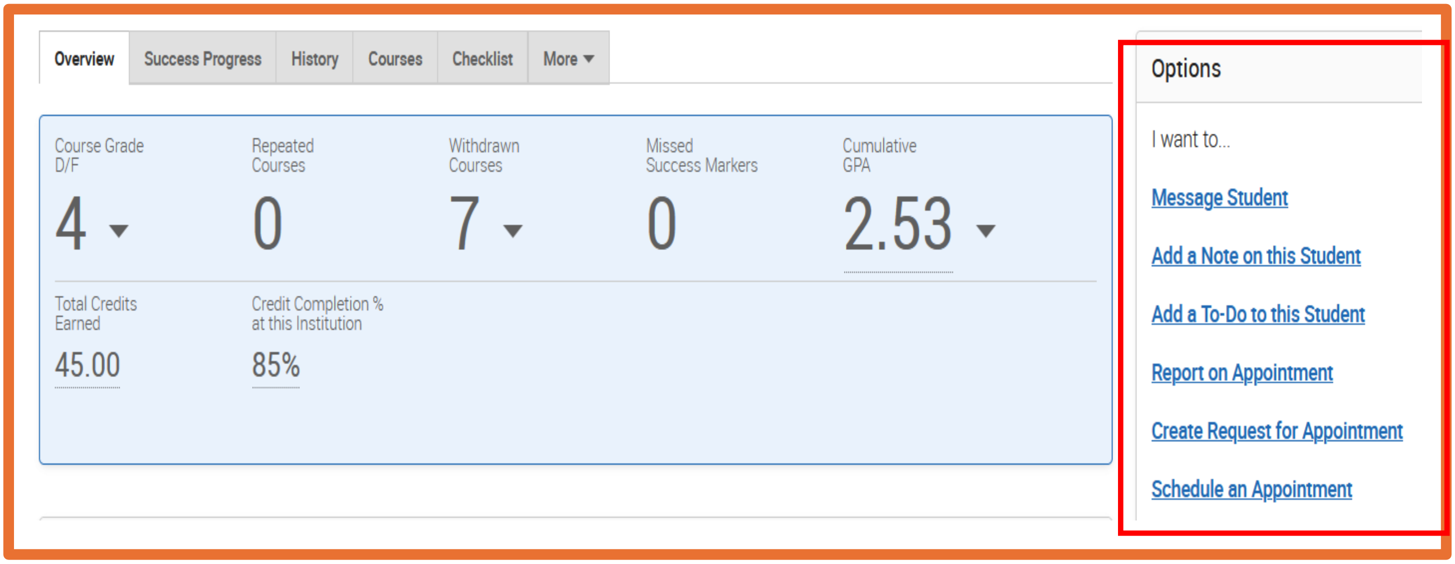
This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**

On the right side of the **Student Profile**, staff and faculty can find additional general information about the student (such as their age and contact information) and take action within the platform. For example, if there is a phone number for the student, the staff member can click on it and open a call via Microsoft Teams or other internet telephone program.

Each Student Profile displays their **Success Team** which can also be found on the right side of the Student Profile. This identifies a student's assigned advisors, which could include a **Major Faculty Advisor** and or a **Professional Academic Advisor**. It also includes the student's instructors for the current semester.



Depending on permissions, certain **Actions** can be taken. For example, this can include actions such as scheduling an appointment for the student, adding documentation to the Student's Profile, adding the student to a student list, or issuing an Alert on the student.



2. Success Progress Tab

The **Success Progress** tab provides insight into different variables that might be indicators of eventual success, including a breakdown of the overall Predicted Support Level, key course milestone completion, and academic progress and performance trends.

Predicted Influencers

Predicted Influencers are derivatives of the **Student Success Predictive Model**. The Student Support Predictive Model is a machine learning algorithm that uses your institution's historical data to predict the success likelihood for your current students relative to a particular outcome, graduation or persistence. The Predicted Support Level is either: High, Moderate, or Low.

Each *influencer* (e.g. Earned/Attempted Ratio, High School GPA, etc.) represents student variables related to performance in a given area, or *influencer category* (Performance, Progress, etc.). Each influencer is then assigned a *directionality* (positive, negative, or neutral) based on the impact the given variable has on the student's overall Predicted Support Level.

Buffalo State The State University of New York believe. inspire. achieve.

Navigate360

Overview | Success Progress | History | Courses | Checklist | More

Success Markers

The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.

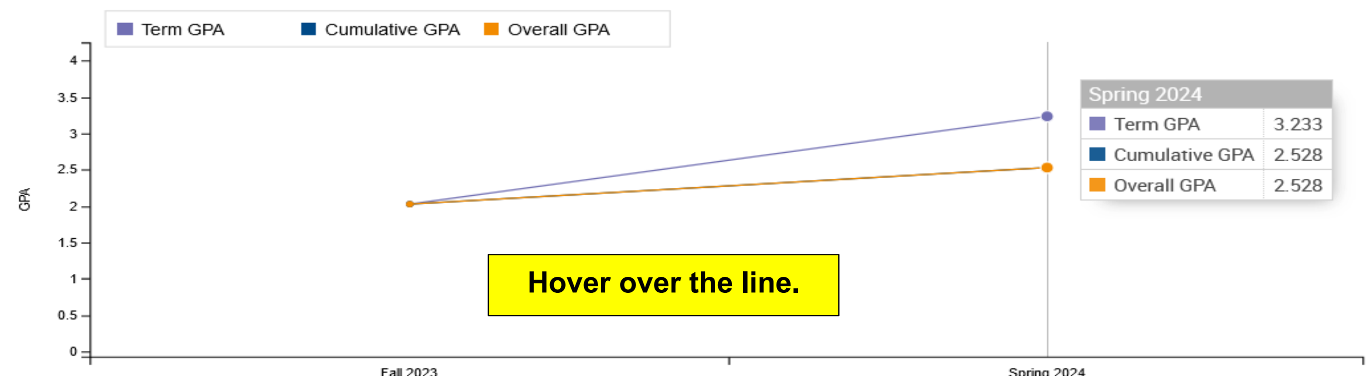
Completed Missing Upcoming

0 missed markers

Notification	Outcome
There are no missed notifications for this student.	

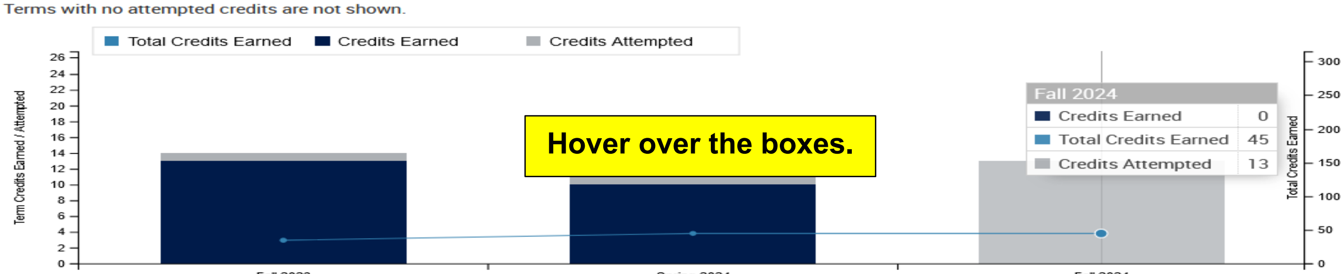
GPA Trends By Term *

* Terms with no attempted credits are not shown.



Credit Trends By Term *

* Terms with no attempted credits are not shown.



TERM	TERM GPA	CUM GPA	OVERALL GPA	CREDITS ATTEMPTED	CREDITS COMPLETED	TOTAL CREDITS
Fall 2023	2.025	2.025	2.025	14.00	13.00	35.00
Spring 2024	3.233	2.528	2.528	13.00	10.00	45.00

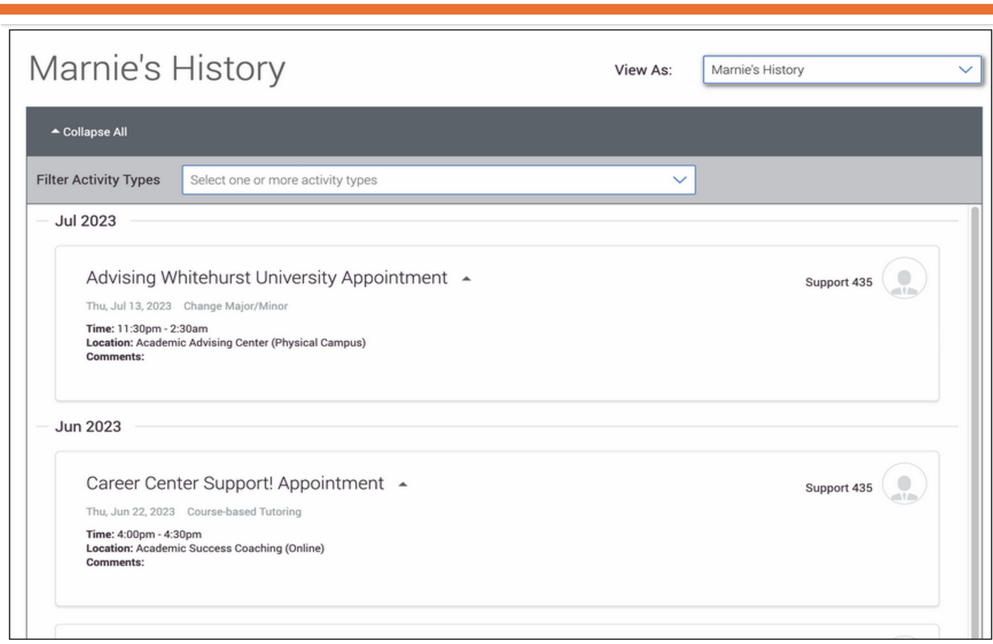
This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**

3. **History Tab**

The **History** tab of a Student Profile provide staff and faculty with a view of all recorded activity for a student. This includes Appointments, Alerts, Cases, To-dos, Notes, Appointment Summaries, and Progress Reports.

On this **History** tab of the Student Profile, you have access to recorded interactions and activities with this student. These include your **To-Dos**, **Notes**, **Cases**, **Alerts**, **Progress Reports**, **Appointment Summaries**, and **visits to support centers**. The History version includes all of the same information as the Reports/Notes version, but viewed together within reverse chronological order, rather than as separate sections (except for the staff user's To-Dos about the student).

Note: You can only view activity within Care Units for which you have the appropriate permissions.



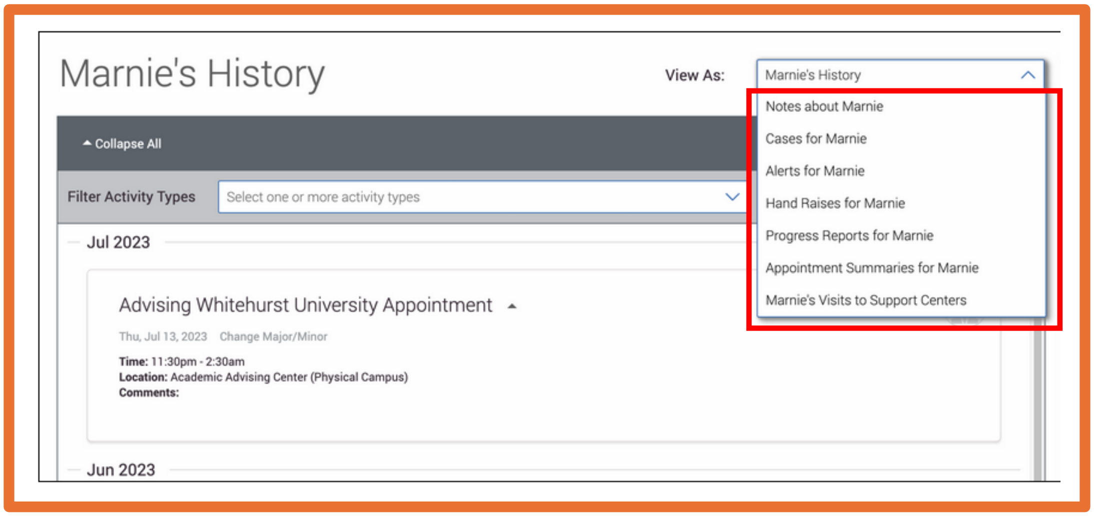
Features Available in History Version

Display Individual Sections

You can still view individual sections by selecting **[Student's First Name] History** and choosing an activity type from the drop-down that appears. This shows the traditional Reports/Notes view for those sections, as described earlier in this article.

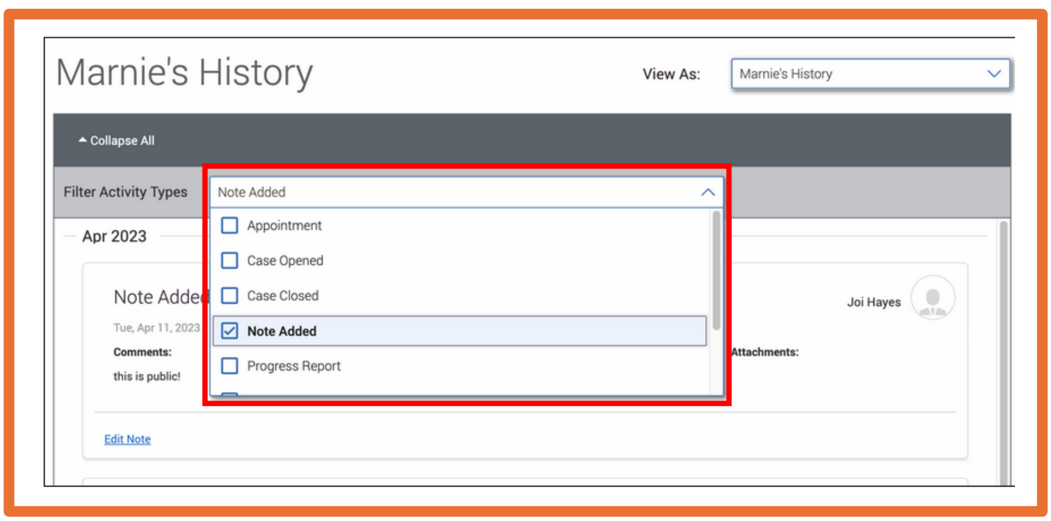
BUFFALO STATE The State University of New York } believe. inspire. achieve.

Navigate360



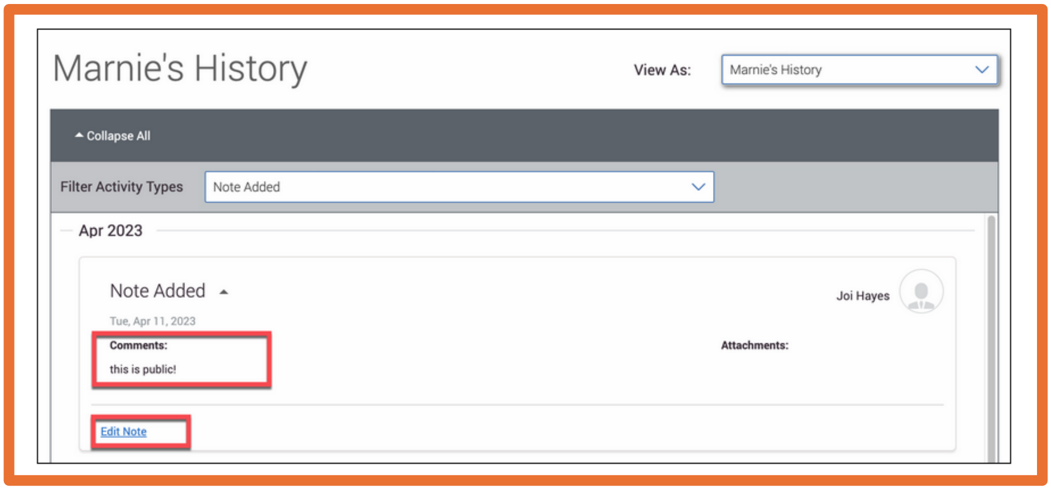
Filter by Type

Click in the filter bar at the top to narrow the History view to specific activity types of interest. You can select one or multiple activity types.



Expand All/Collapse All

This option expands or collapses details for each activity type. When expanded, you can also take action on items when available, like managing a Case.



To-Dos

This section collects all of your active To-Dos for this student, whether upcoming or overdue. From this section, you can edit, clear, or delete your To-Dos, either individually or en masse.

Notes

This section collects all the Notes entered on the student that you have permission to view. From this section, you can view more details of individual Notes or you can add, edit, or delete Notes en masse. Staff and faculty can use notes to document information about a student that **may not be specific to an appointment or visit.** When needed, staff and faculty can make a Note visible to the student.

Notes offer an additional mechanism to jot down information about a student, collaborate across Care Units, and create a record of information provided directly to the student. Unlike Appointment Summary reports, Notes are not tied to specific appointments, nor are they formatted specifically for specific Care Units.

Notes can be added to more than one student at the same time. There is a cap of **100 students** for whom Notes can be added to at once.

Cases

Note: Cases can only be opened automatically as a result of an **Alert**. It is not possible to manually open a Case on behalf of a student.

With the correct permissions, you can view and manage all open and closed Cases on the **Cases** page. It is a streamlined view where users can access and search all cases they have permission to view in one place.

Some Alerts, such as In Danger of Failing, are configured to automatically open a **Case.** A Case is an **Alert** or **Referral** that is assigned to the student's advisor(s), or in some instances, a campus official for further action. Moreover, a Case is an electronic Case file where staff across departments (e.g., financial aid, bursar, tutoring, counseling) can coordinate and collaborate on the follow up with the student. Cases create a formalized next step for **action or intervention** on the issued Alert or Referral, should that be needed. The electronic record logs all attempted outreach (failed/successful), and **Case Outcomes**. Details about the Case, including the **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page.

If the Case is closed, you may view the **Case Closure Reason** by clicking on the blue link under the Cases column.

Alerts

Alerts are a way to draw attention to a student who might be at-risk for a variety of reasons, such as losing financial aid, needing tutoring, or intending to withdraw from the institution.

Alerts can be issued throughout the platform, including your **Staff** or **Professor Home** page, a **Student's Profile** page, the **Advanced Search**, and through **Progress Reports**. Alerts are viewed primarily on the Student's Profile page and the Professor Home page

Alerts provide **staff** and **faculty** with the ability to draw attention to students or prompt a referral with another department using the platform.

Hand Raise

Hand Raise allows students to "raise their hand" by issuing alerts on themselves, using the Navigate Student app or the Navigate Student desktop site. Students can use Hand Raise either from the **Quick Add** menu or the **Help menu**.

Progress Reports

This section shows all issued **Progress Reports** for the student. From this section you can view more details on the Progress Report, if you have the proper permission.

Appointment Summaries

This section shows all completed **Appointment Summaries** for the student that you have permission to view. You can filter Summaries by Care Unit. To view full details of the summary report, click **View Report**. That opens the Appointment Summary and allows you to **Edit** or **Delete** the report if you have the proper permissions.

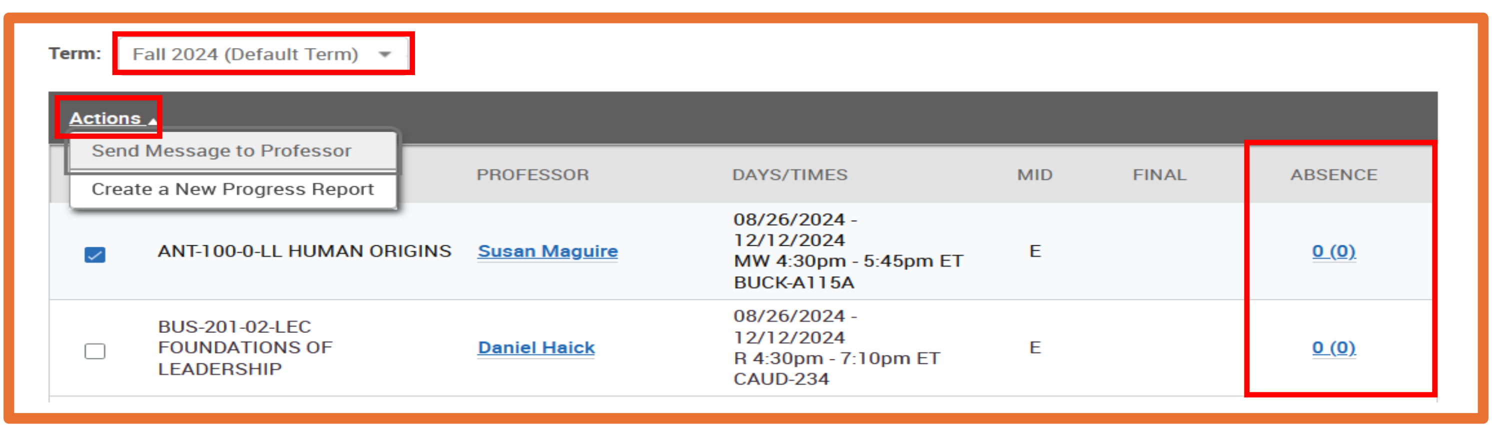
Recent Visits to the Student Support Center

Student's Recent Visits To The Student Support Centers will list any entries made for the student for appointments in support centers.

4. Courses Tab

The **Courses** tab of the Student Profile contains detailed historical and current course and assignment information for that student. By default, it shows the current term by date, but using the Term filter, users can see any course the student has been enrolled in.

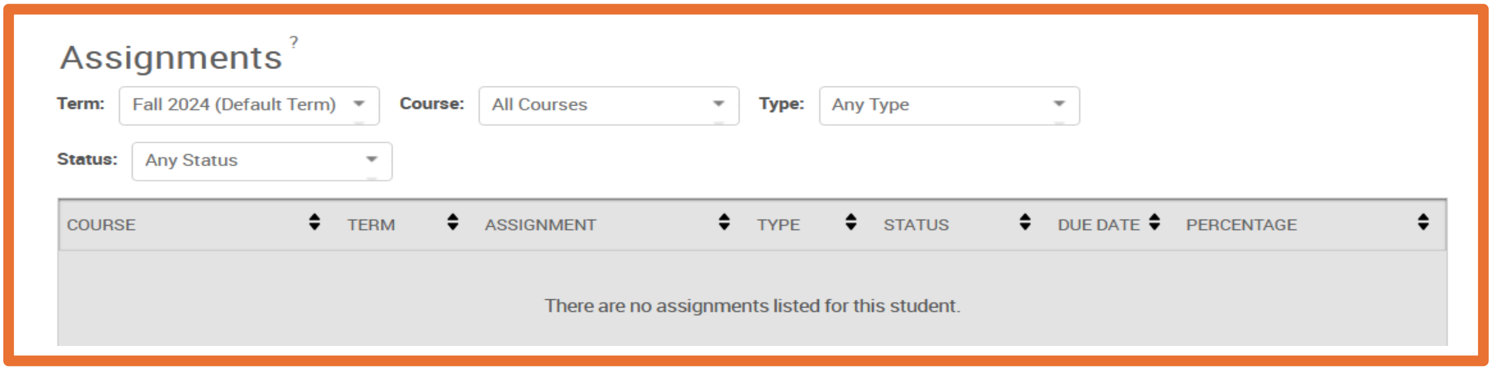
For each class, the associated professors and meeting times/location are listed. If available, the student's mid-term grade, final grade, and absence record is shown. The mid-term and final grades are based on the data stored in Banner. **The absence record shows two numbers: the student's total number of absences before the parentheses and the student's number of unexcused absences within the parentheses.** It is based on attendance information submitted directly in Navigate. Depending on permissions, staff and faculty can take actions such as contacting the student's professors or submitting a Progress Report for a specific course.



Assignments

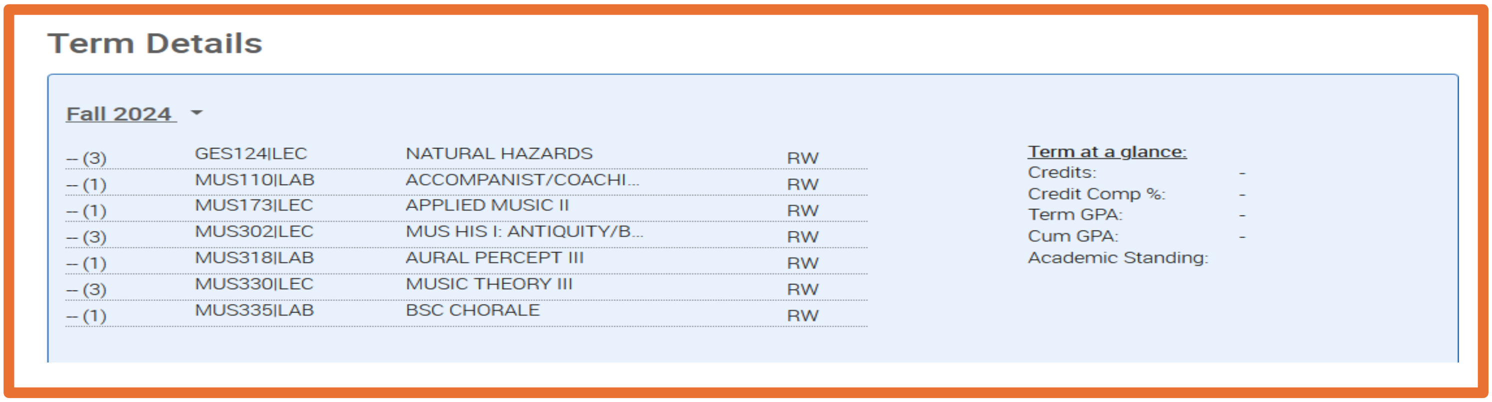
The **Assignments** section shows specific class assignments that faculty or staff input directly into Navigate. Users can filter assignments by Term, Course, Type, or Status.

Each assignment shows the associated class and due date, as well as the student's completion status. Depending on permissions, faculty and staff can edit the student's assignments and completion status directly in this section.



Term Details

The **Term Details** section shows an unofficial transcript for the student, listing the courses for each term in reverse chronological order. For each course, the attempted/completed credits are shown, as well as the student's final grade. For each term, the **Term at a Glance** section shows the student's overall performance during the given term, including total completed credits for the term, total credit completion ratio for the term, total term GPA, total Cumulative GPA, and Academic Standing for the term. If the student has any articulated transfer coursework, this information will also show on the student's Term Details section. When available, the student's pre-enrollment credits are listed at the bottom of the Term Details section.



Buffalo State The State University of New York | believe. inspire. achieve. | Navigate360

Spring 2024

3	CWP102|LEC	ARGUMENTATION AND R...	A
1	MUS110|LAB	ACCOMPANIST/COACHI...	A-
1	MUS171|LEC	APPLIED MUSIC I	B
1	MUS219|LAB	AURAL PERCEPTION II	B-
3	MUS231|LEC	MUSIC THEORY II	C+
1	MUS335|LAB	BSC CHORALE	A
0 (3)	PSY101|LEC	INTRO TO PSYCH	F

Term at a glance:

Credits:	10
Credit Comp %:	77%
Term GPA:	3.233
Cum GPA:	2.528
Academic Standing:	GOOD STANDING

Fall 2023

3	CWP101|LEC	COLLEGE WRITING I	B
1	HON111|LEC	INTRO HON	D
1	MUS110|LAB	ACCOMPANIST/COACHI...	D
2	MUS122|LEC	INTR MUSIC STUDIES & ...	C-
0 (1)	MUS161|LAB	CLASS PIANO I	E
1	MUS171|LEC	APPLIED MUSIC I	B
1	MUS218|LAB	AURAL PERCEPTION I	C
3	MUS230|LEC	MUSIC THEORY I	C-
1	MUS335|LAB	BSC CHORALE	A

Term at a glance:

Credits:	13
Credit Comp %:	93%
Term GPA:	2.025
Cum GPA:	2.025
Academic Standing:	GOOD STANDING

Spring 2023

3	ECO201|NA	PRIN OF MACRO	[TR]	TR

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	-
Cum GPA:	-
Academic Standing:	

Fall 2022

3	MAT311|NA	INTR PROB & STA	[TR]	TR
3	PSC102|NA	INTR AMERICAN GOVER...	[TR]	TR

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	-
Cum GPA:	-
Academic Standing:	

January Term 2022

3	BUS1XX|NA	INTRO BUSINESS RESEA...	[TR]	TR

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	-
Cum GPA:	-
Academic Standing:	

BUFFALO STATE The State University of New York | believe. inspire. achieve.

Navigate360

Fall 2021

3	BUS320|NA	PRIN MARKETING	[TR]	TR
4	MAT161|NA	CALCULUS I	[TR]	TR

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	-
Cum GPA:	-
Academic Standing:	

Fall 2020

3	CIS101|NA	COMPUTER FUNDAMEN...	[TR]	TR

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	-
Cum GPA:	-
Academic Standing:	

Pre-Enrollment and Progression

3 Years of Regents and PreCalc:	2023-08-23
SUNYGE FL Waiver SPA102 HS:	2023-08-23
High School Cum GPA:	97.29

High School: Maryvale High School

Hovering over a specific course shows detailed information about the student's performance in the specific course.

Fall 2023

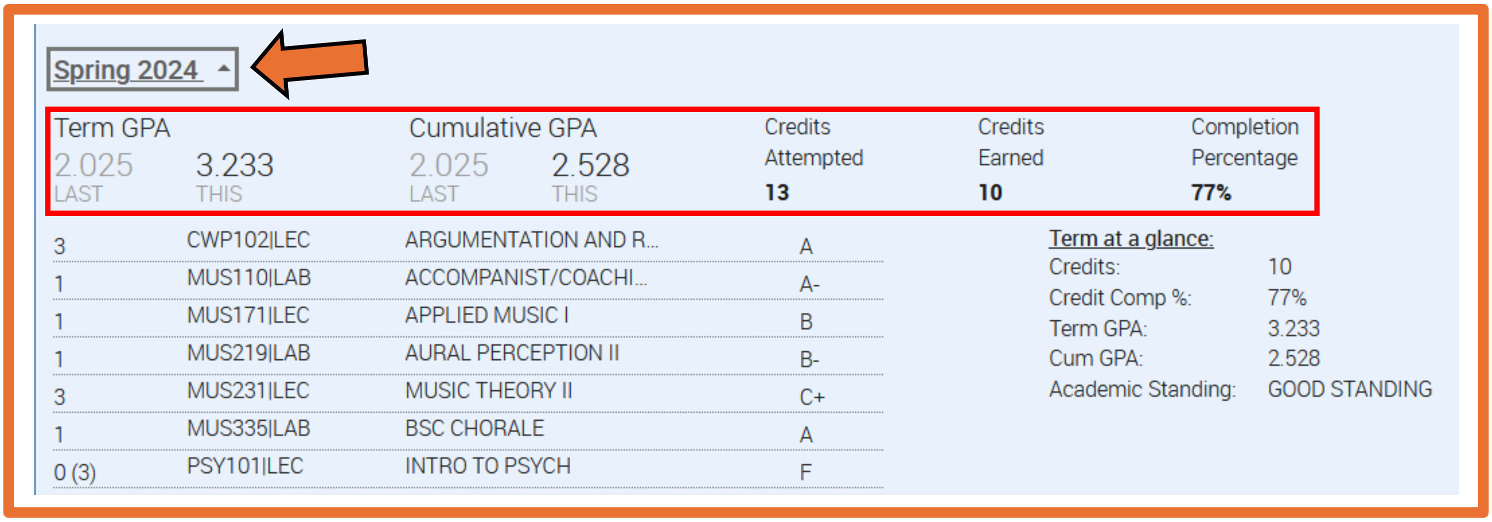
3	CWP101|LEC	COLLEGE WRITING I	B
1	HON111|LEC	INTRO HON	D
1	MUS110|LAB	ACCOMPANIST/COACHI...	D
2	MUS122|LEC	INTR MUSIC STUDIES & ...	C-
0 (1)	MUS161|LAB	CLASS PIANO I	E
1	MUS171|LEC	APPLIED MUSIC I	B
1	MUS218|LAB	AURAL PERCEPTION I	C
3	MUS230|LEC	MUSIC THEORY I	C-
1	MUS335|LAB	BSC CHORALE	A

MUS161
CLASS PIANO I
Grade: E
Status: REGISTERED
Attempted: 1
Earned: 0

Term at a glance:

Credits:	13
Credit Comp %:	93%
Term GPA:	2.025
Cum GPA:	2.025
Academic Standing:	GOOD STANDING

Selecting the drop-down indicator next to each term header shows term-specific details in comparison to the student's performance for the previous term.

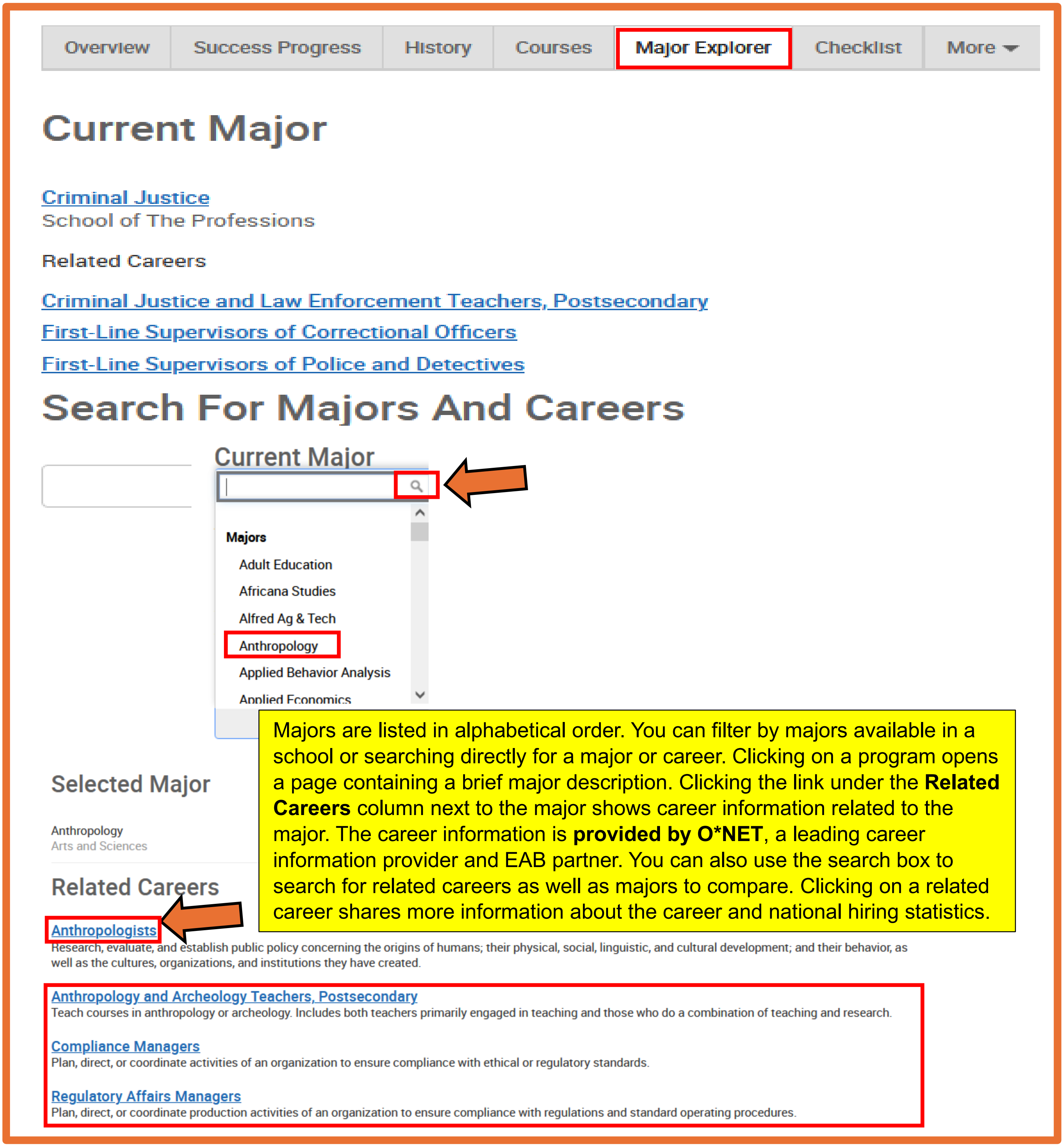


5. Major Explorer

The **Major Explorer** tab on the **Student Profile** helps advisors help students search for majors and review associated career data.

The Major Explorer can be found as a tab within the **Student Profile** page. Please note that the Major Explorer feature on the Student Profile in Navigate Staff is distinct from the **My Major** feature within Navigate **Student.**

Major Explorer can be a helpful feature for **staff** members as they prepare for a student interaction or help a student explore programs or careers where they might find success during their undergraduate years or post-graduation.



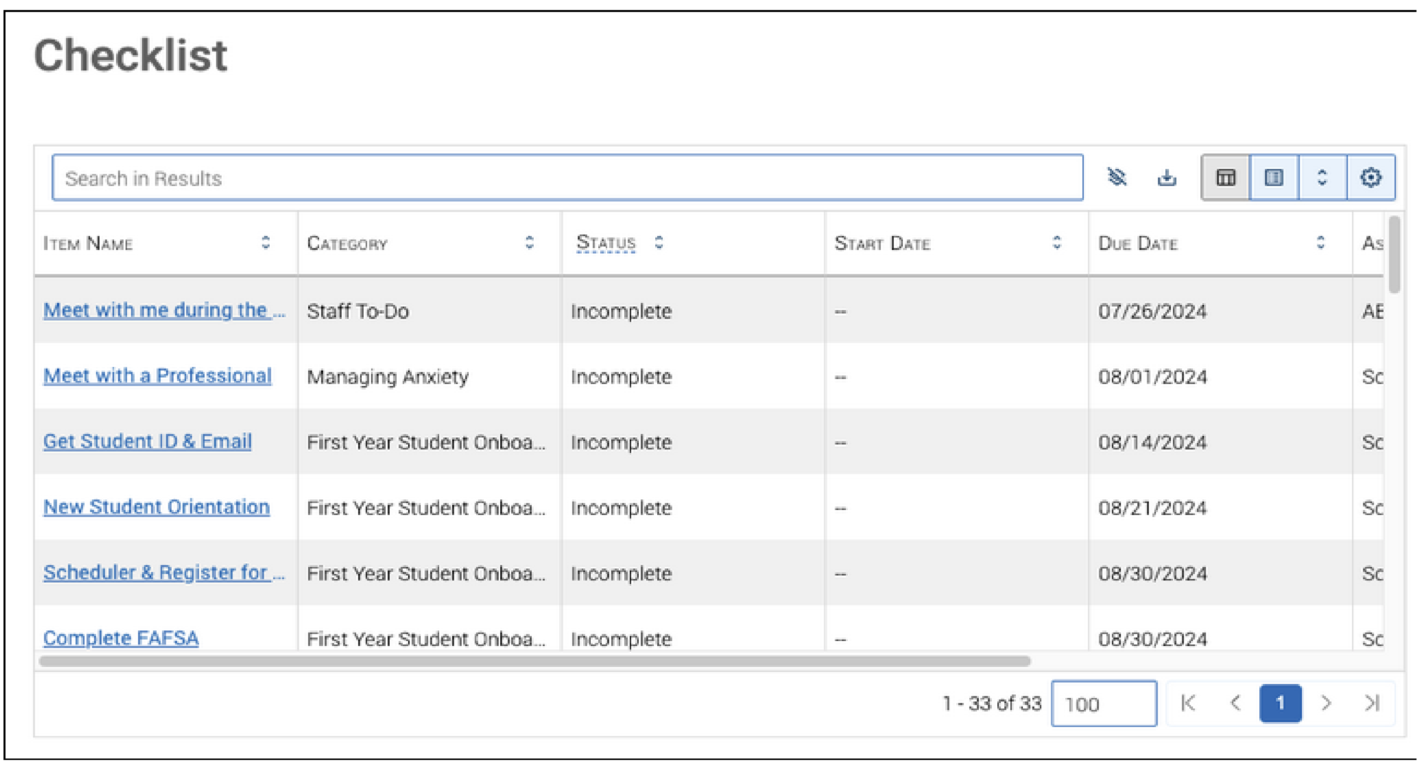
Majors are listed in alphabetical order. You can filter by majors available in a school or searching directly for a major or career. Clicking on a program opens a page containing a brief major description. Clicking the link under the **Related Careers** column next to the major shows career information related to the major. The career information is **provided by O*NET**, a leading career information provider and EAB partner. You can also use the search box to search for related careers as well as majors to compare. Clicking on a related career shares more information about the career and national hiring statistics.

6. Checklist

The Student Profile **Checklist** tab combines existing "To-Do" features including Staff To-Dos and To-Dos/Events created in the Content Administration Tool, with Journeys in one place so that staff can view all actions added to the student's Checklist in Navigate Student.

The information included on the Checklist tab should help staff prepare for a conversation with the student. Staff can view all To-Dos a student has access to within their Navigate Student app. They can also access answers provided by students who complete the intake survey in the app.

Note: Staff cannot view Personal To-Do's students created for themselves. Staff can only view other staff member's Staff To-Do's in the Checklist if they have the **Allow Staff to View To-Dos from Other Staff** permission. If the Checklist tab is enabled, the Path tab is disabled.



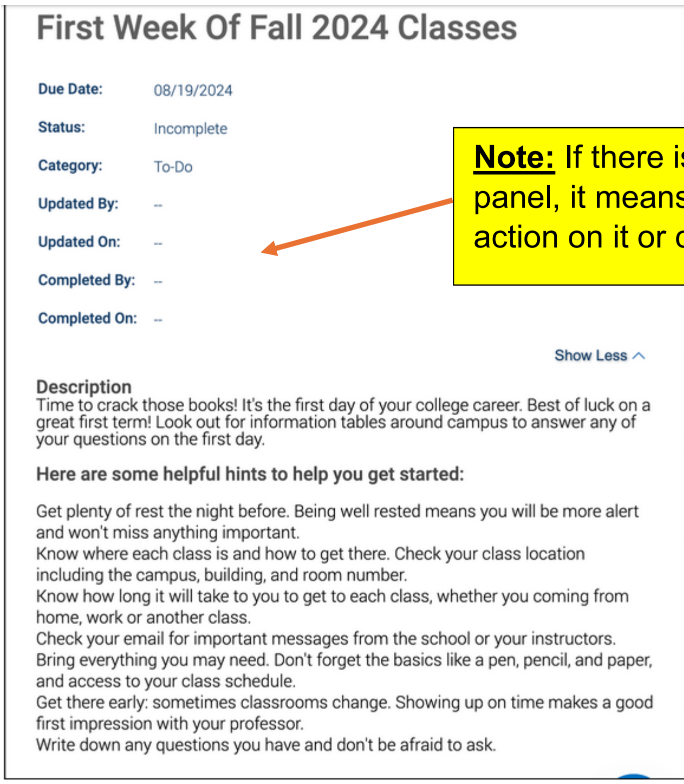
Checklist

Search in Results

Item Name	Category	Status	Start Date	Due Date	As
Meet with me during the ...	Staff To-Do	Incomplete	--	07/26/2024	AE
Meet with a Professional	Managing Anxiety	Incomplete	--	08/01/2024	Sc
Get Student ID & Email	First Year Student Onboa...	Incomplete	--	08/14/2024	Sc
New Student Orientation	First Year Student Onboa...	Incomplete	--	08/21/2024	Sc
Scheduler & Register for ...	First Year Student Onboa...	Incomplete	--	08/30/2024	Sc
Complete FAFSA	First Year Student Onboa...	Incomplete	--	08/30/2024	Sc

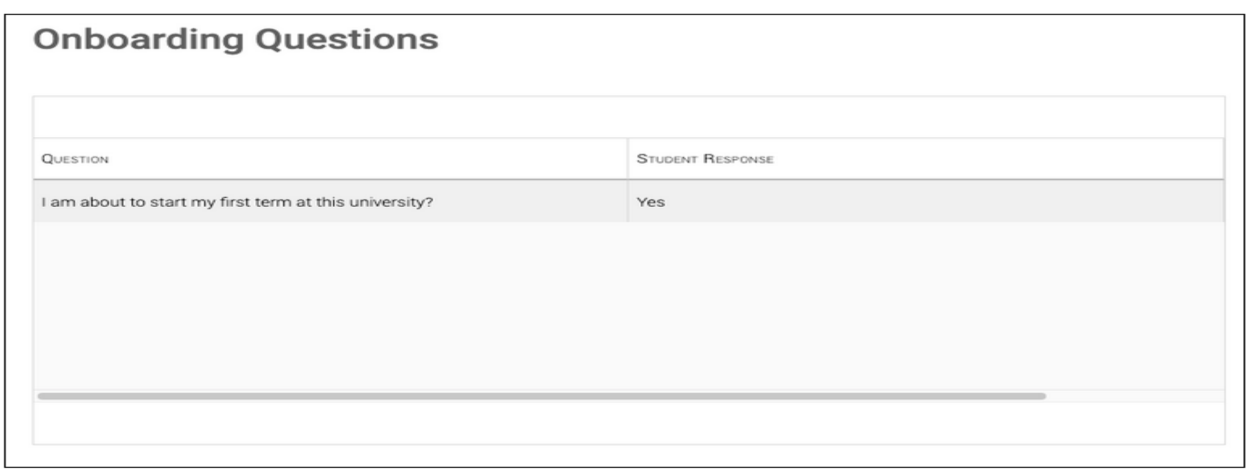
1 - 33 of 33 100 1

If a user clicks on an item's name, a read-only panel opens with more details about the To-Do or step. Staff can view but cannot click any links configured, like associated resources and appointment scheduling links.



__Note:__ If there is no additional information on the panel, it means neither staff nor student have taken action on it or commented on it.

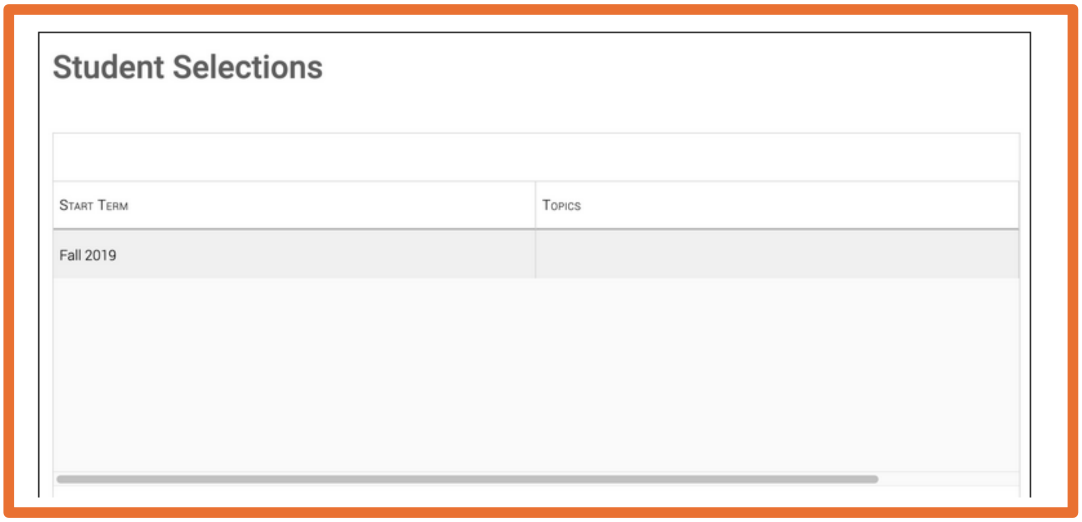
The other section of the **Checklist** tab is the Onboarding Questions section, which displays student answers to the Intake Survey.



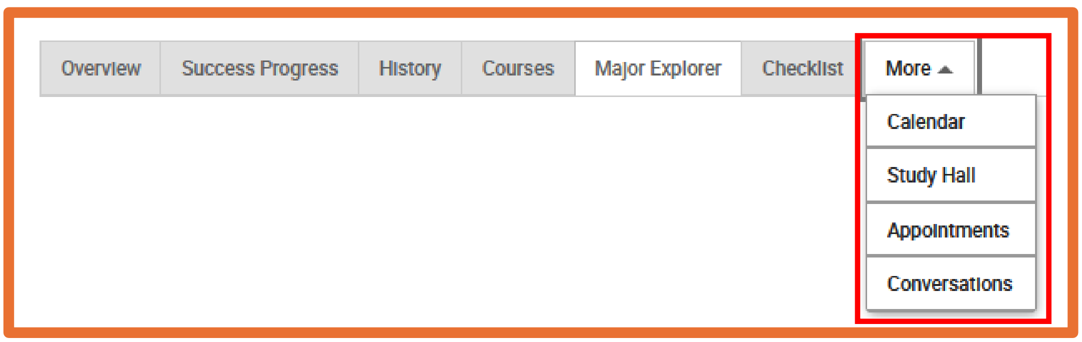
Question	Student Response
I am about to start my first term at this university?	Yes

This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**

Alternatively, this section may appear as Student Selections which displays the student's start term and Topics selections for institutions that have a legacy app configuration.



Note: To have access to the **Checklist** tab once the related features are enabled, the user's role must have the **View the Checklist Tab on the Student Profile** permission enabled along with the ability to view at least some Student Profiles.



7. Student Profile Calendar

The Student Profile **Calendar** tab provides a view of the student's calendar to staff. The Calendar tab is located within an individual student's profile, accessible by clicking the **More** tab and then selecting Calendar. The Calendar tab provides staff and faculty with a view of all scheduled appointments for that student.

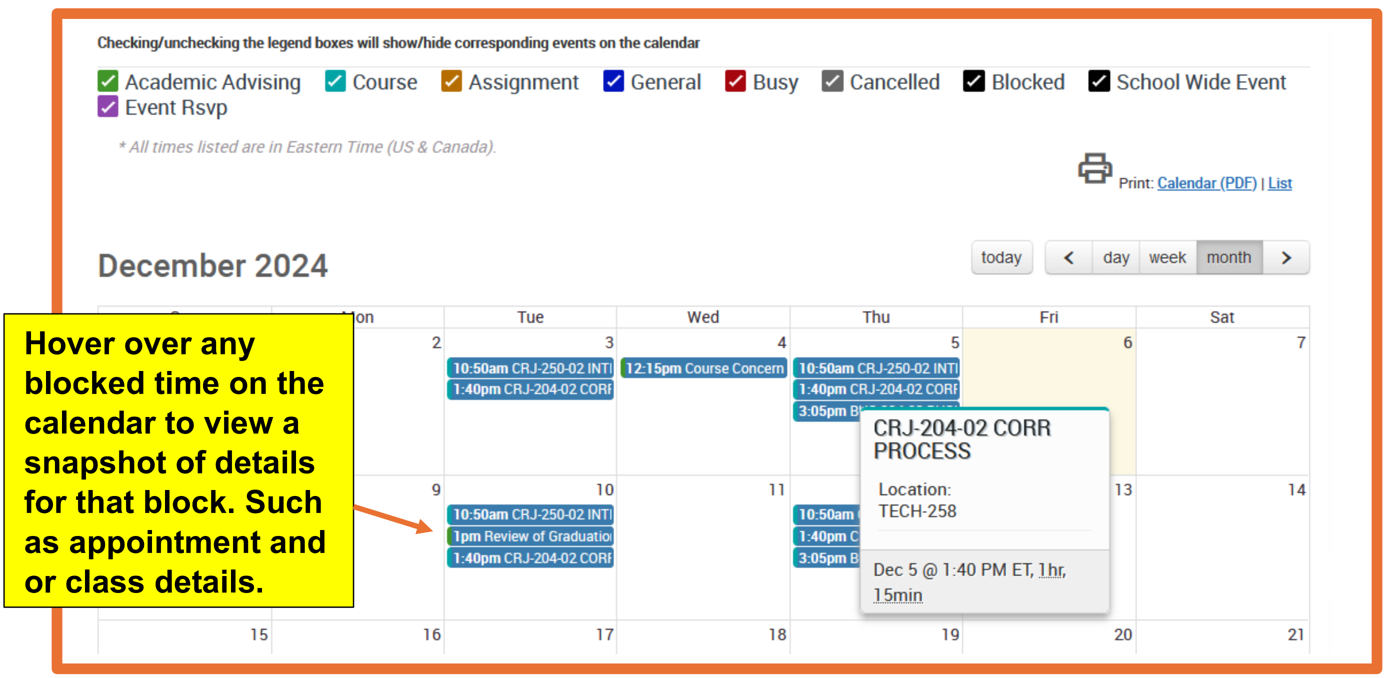
> **Note:** Access to the Calendar tab is permission-based by user role. The level of detail and actions available within the tab are also permission-based.

Feature Overview

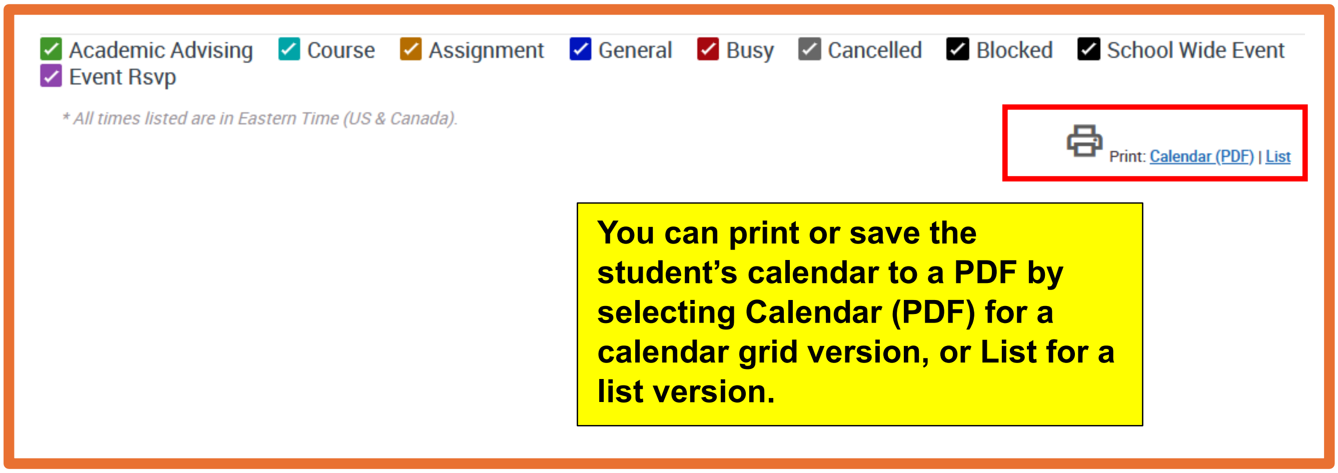
The **Calendar** tab shows the student's calendar, including all appointments within Navigate, all currently registered courses, all assignments, and any **busy times** if the student chooses to sync a personal calendar to the platform.

> **Note:** You can only view appointments from Care Units for which you have the appropriate permissions. If the Calendar tab is not an option, you may not have permission to view this feature. Contact your institution's Application Administrator with any questions regarding your permissions.

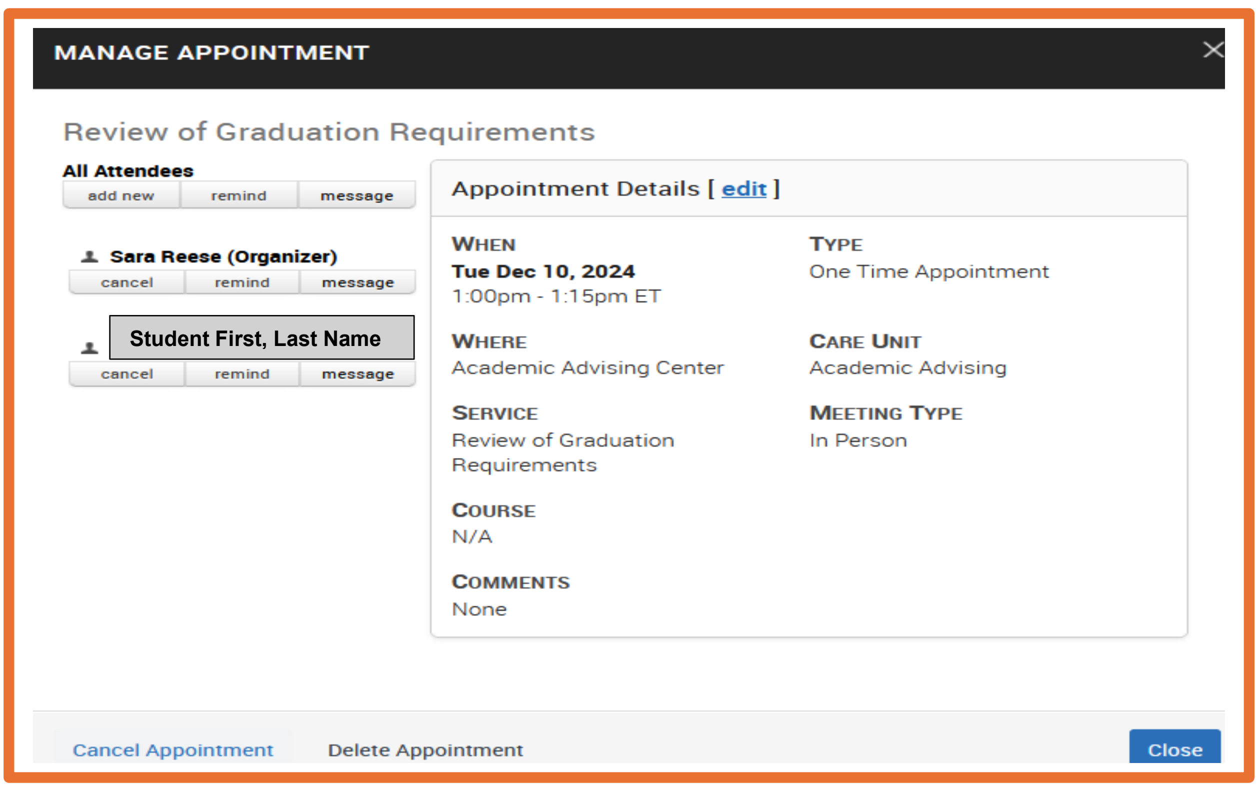
You may choose to view the calendar by any day, week, or month time frame.



Notice the legend just above the calendar grid. Selecting one of the check boxes enables associated appointments to show on the calendar grid and deselecting the checkbox hides them. These options are automatically checked by default.



If you have the appropriate permissions, you can click on an appointment in this calendar and see more details. The information provided includes: attendees, organizer, date and time, location, service, course (if applicable), care unit, comments, and type of appointment.



This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**

From the **Manage Appointment** screen, you can also take action on the appointments. Depending on your user permissions, you may be able to take action on all of the appointments, or only the appointments you scheduled with the student. Actions available include:

Add new attendees - Click **All Attendees** and select **Add New**. You can then search for and add another attendee.
Remind all or one attendee - Click either **All Attendees** or an individual's name. Select **Remind** to send them a reminder about the appointment. You are taken to a page to choose the format of the reminder (either email or text), customize the message language, and attach files.
Message all or one attendee - Click either **All Attendees** or an individual's name. Select **Message** to send them a message about the appointment. You are taken to a screen to choose the format of the message (either email or text), customize the message language, and attach files.
Cancel one attendee - Click an individual's name and select **Cancel** to cancel their attendance for this appointment. You are taken to a screen to select the cancellation reason and add any comments.
Cancel appointment - Click **Cancel Appointment** to cancel the appointment for everyone. You are then taken to a page to select who to cancel the appointment for, the cancellation reason, and add any comments.
Delete appointment - Click **Delete Appointment** to delete the appointment from the Navigate platform.

Note: Typically, only Administrators have the Delete Appointment permission. We strongly recommend never deleting appointments. Deleted appointments are entirely removed from the platform and data is irretrievable.

Edit appointment - Click **Edit** to change one or more parts of this appointment. You are then taken to the primary Staff Scheduling page to update any portion of the appointment. See this article to learn more about scheduling appointments.

With the appropriate appointment edit permissions, you may also drag and drop appointments between days on the calendar to update the date of the appointment.

If you prefer to view a list of all upcoming and recent appointments with the student, use the **Appointments** tab of the student profile.

8. Study Hall

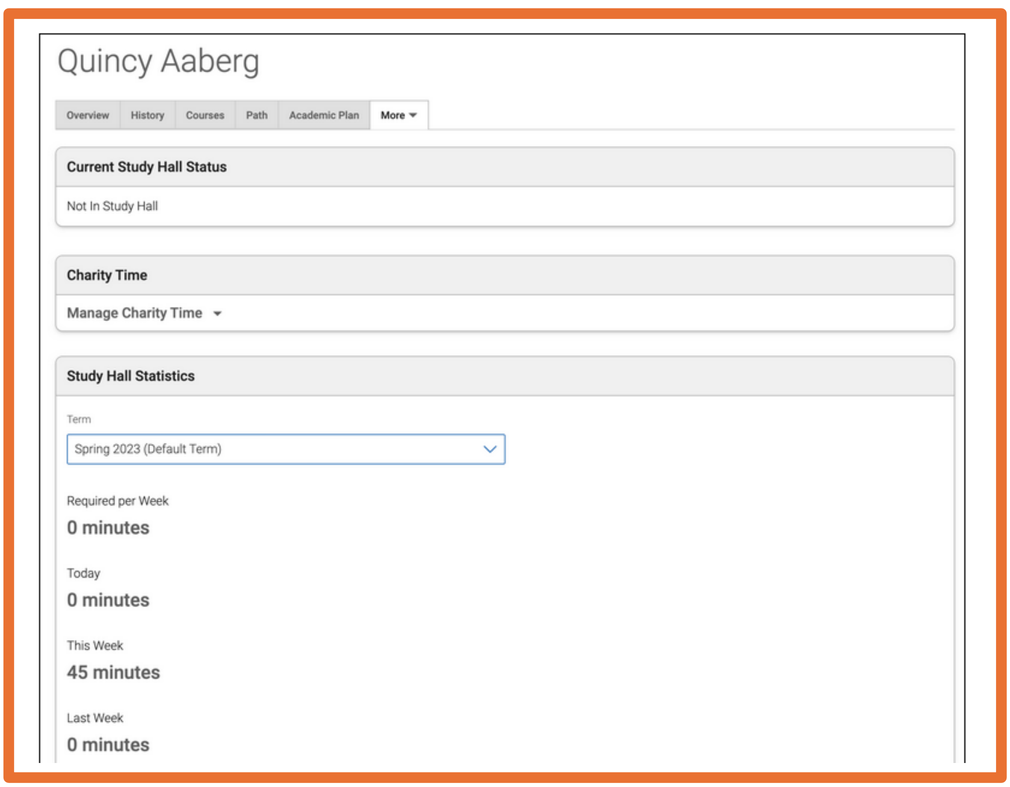
The **Study Hall** tab in a Student Profile provides statistics on a student's progress toward required weekly Study Hall hours. Study Hall features are most commonly used by athletics departments and are optional within the Navigate platform.

The Study Hall tab is located within an individual Student Profile, accessible by clicking the tab called **More** towards the top of the profile screen, and then selecting **Study Hall**.

Feature Overview

The Study Hall tab provides statistics on that student's progress toward required weekly Study Hall hours. In addition, staff with the proper permissions can manage **Charity Time** for that student.

If you do not see the **Study Hall** tab, you may not have permission to view this feature. Contact your institution's Application Administrator with any questions regarding your permissions.

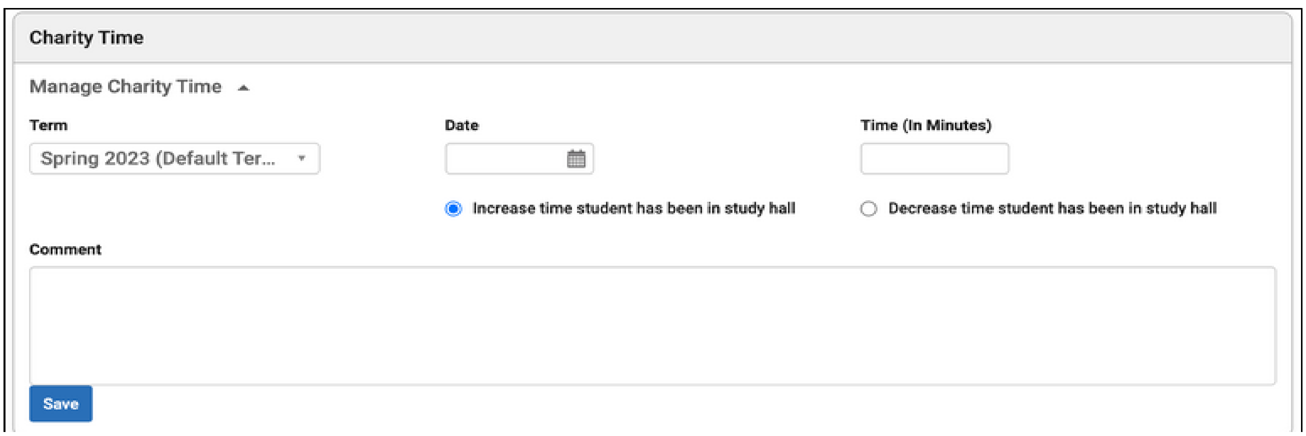


The Study Hall tab provides three sections of information:

<u>Current Study Hall Status</u> - Displays whether the student is currently checked into Study Hall.

<u>Charity Time</u> - Lets an administrator or staff member control or edit the amount of time a student has accumulated towards their Study Hall requirement. Staff can award a student *Charity Time,* which decreases the remaining amount of time a student must earn in Study Hall. For example, if a student has two hours of required Study Hall per week, but a staff member awards 30 minutes of charity time, then a student would only be required to earn one hour and 30 minutes of time in a study hall location.

To add charity time, select the **Manage Charity Time** link. Enter the required information, which includes date, time (in minutes), a radio button for increase or decrease in required hours, and any comments.



<u>Study Hall Statistics</u>

Shows the total required Study Hall hours per week for the student and the amount of Study Hall time completed Today, This Week, and Last Week. It has a Term drop-down so you can see previous terms' Study Hall Statistics. This section also indicates if a student does not need to complete Study Hall hours in the current term.

9. Appointments

The Student Profile **Appointments** tab shows a student's upcoming, recent, and no-show appointments. The Appointments tab is located within an individual student's profile, accessible by clicking the tab called **More** towards the top of the profile screen, and then selecting Appointments. If the Appointments tab is not an option, you may not have permission to view this feature. Contact your Application Administrator with any questions regarding your permissions.

The Appointments tab provides staff and faculty with a list of all upcoming, recent, and no-show appointments for a particular student. Access to the Appointments tab is permission-based by user role. The level of detail and actions available within the tab are also permission-based. You can only see student appointments for Care Units where you have the appropriate permissions.

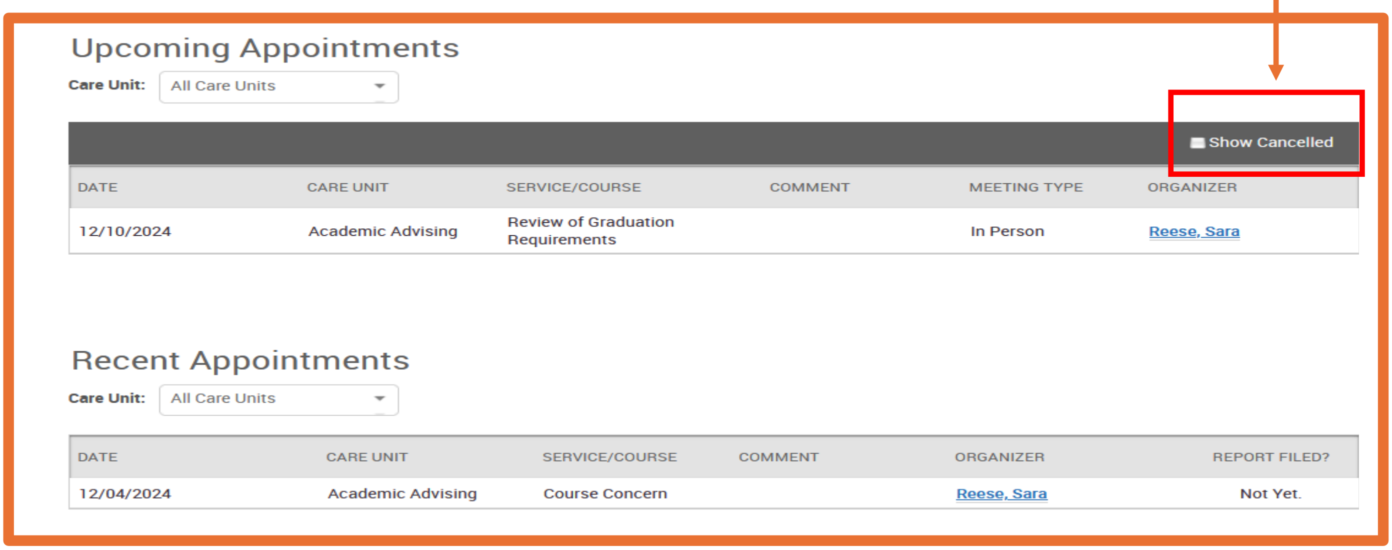
Feature Overview

The **Appointments** tab of the Student Profile provides a list of the upcoming, recent, and no-show appointments for the student.

Upcoming Appointments

The **Upcoming Appointments** section of the tab lists all currently scheduled appointments with the student that you have permission to view. Filter the list by Care Unit using the drop-down menu. Show canceled appointments by selecting the **Show Cancelled** checkbox. All appointments scheduled within the next 90 days display, depending on user permissions to access that information.

No actions can be taken on appointments in this section.


Upcoming Appointments

Care Unit: All Care Units

Show Cancelled

DATE	CARE UNIT	SERVICE/COURSE	COMMENT	MEETING TYPE	ORGANIZER
12/10/2024	Academic Advising	Review of Graduation Requirements		In Person	Reese, Sara

Recent Appointments

Care Unit: All Care Units

DATE	CARE UNIT	SERVICE/COURSE	COMMENT	ORGANIZER	REPORT FILED?
12/04/2024	Academic Advising	Course Concern		Reese, Sara	Not Yet.

Recent Appointments

The **Recent Appointments** section lists recently scheduled appointments from the last 90 days with the student that you have permission to view, including Canceled and No-Show appointments. Filter the list by Care Unit using the drop-down menu.

No actions can be taken on appointments in this section.

If Appointment Summaries have been filed on the student appointments, select the **Details** or **No-Show** buttons to view the full Appointment Summary Report.

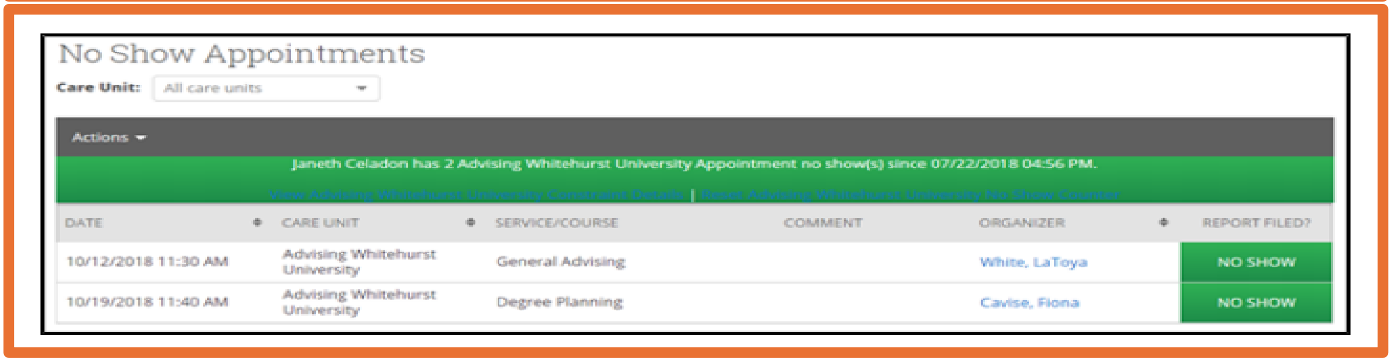
With proper permissions you can edit or delete the Appointment Summary Report, though most likely only reports you personally filed.

No Show Appointments

The **No-Show Appointments** section lists all scheduled appointments where the staff member marked a student as no-show that you have permission to view.

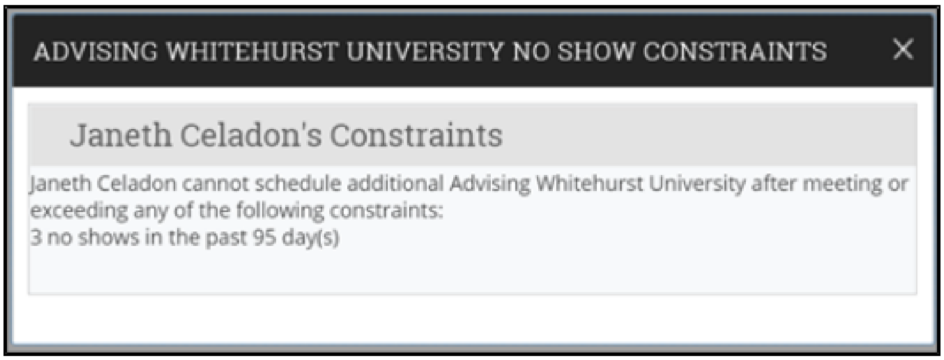
Filter the list by Care Unit using the drop-down menu. You can also export no-show information to Excel using the **Actions** menu.

Notice the green banner at the top of this section. Navigate displays the total number of no-show appointments since a specific time and date. Many institutions may configure rules as to how many no-shows a student can have before the system will prevent them from scheduling additional appointments.



Within this green banner you can select two actions, depending on your user permissions:

View Constraint Details. Selecting this option will display a pop-up screen with the specific no show constraints, configured at the Care Unit level.



Reset No Show Counter. Selecting this option will reset the counter of no-shows to zero and allow the student to schedule again within Navigate, if they had exceeded the limit. A browser pop-up screen will prompt to make sure you want to take this action, before resetting the counter.

Tips for Managing and Viewing Student Appointments

The Appointments section of the Student Profile is meant as a simple view into the upcoming, recent, and no-show appointments with the student. Because no actions on the appointments are available, we recommend using other tabs within the **Student Profile** to manage student appointments.

- If you want to edit appointments with this student, use the **Calendar** tab.
- If you want to submit an Appointment Summary Report for a recent appointment with this student, or mark this student as a no-show, use the **Reporting** section of your **Staff Home** page.
- If you want to export a report of all appointments with this student, use the **Reporting** section of the platform.

10. Conversations

The **Conversations** tab is located within an individual **Student's Profile**. You can access it by clicking the tab called **More** towards the top of the profile screen, and then selecting Conversations. The Conversations tab provides staff and faculty with all communications to and from the Navigate platform for that student.

Access to the **Conversations** tab is permission-based by user role. The types of messages available to view within the tab are also permission-based.

If the Conversations tab is not an option, you do not have permission to view this feature. Contact your institution's Application Administrator with any questions regarding your permissions.

Feature Overview

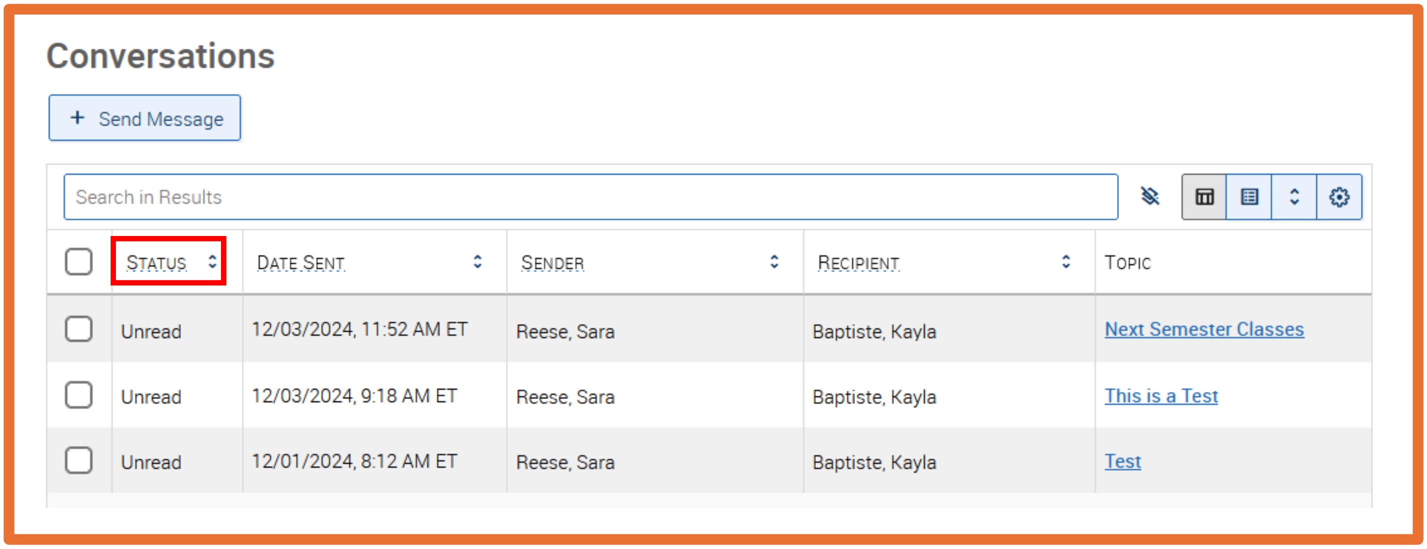
The Student Profile **Conversations** tab shows a list of all communication (emails, texts, and phone calls) to and from the Navigate platform for that student. You cannot take action on conversations on this tab; it is informational only.

Depending on your user permissions, you may be able to view any the following types of communications in this tab:

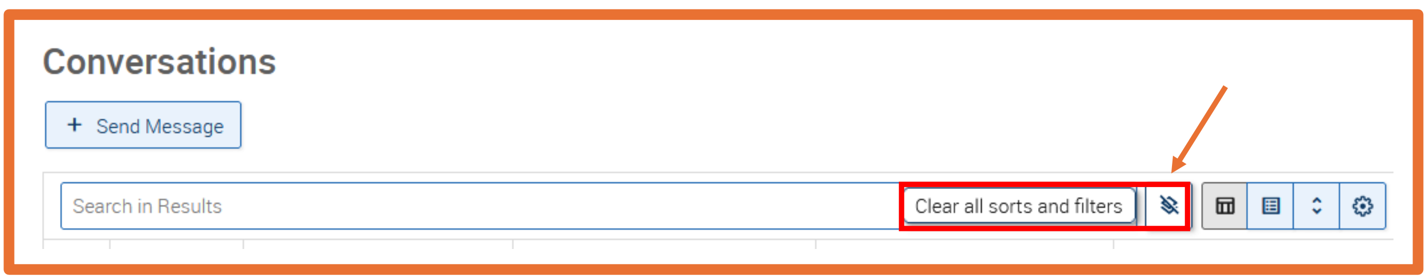
- Communications you personally sent to the student
- Communications that other staff or faculty sent to the students
- Responses from the student
- Automated reminder or notification emails from the Navigate platform.

The Conversations grid shows several columns, including **Status**, which only refers to if the student read the message on the Navigate platform. If the student opened and read the message in a third-party app like their email or text messages, the status will not change.

The table shows only personal messages by default. To see automated messages sent by the Navigate platform, click the **Clear All Sorts and Filters** icon.

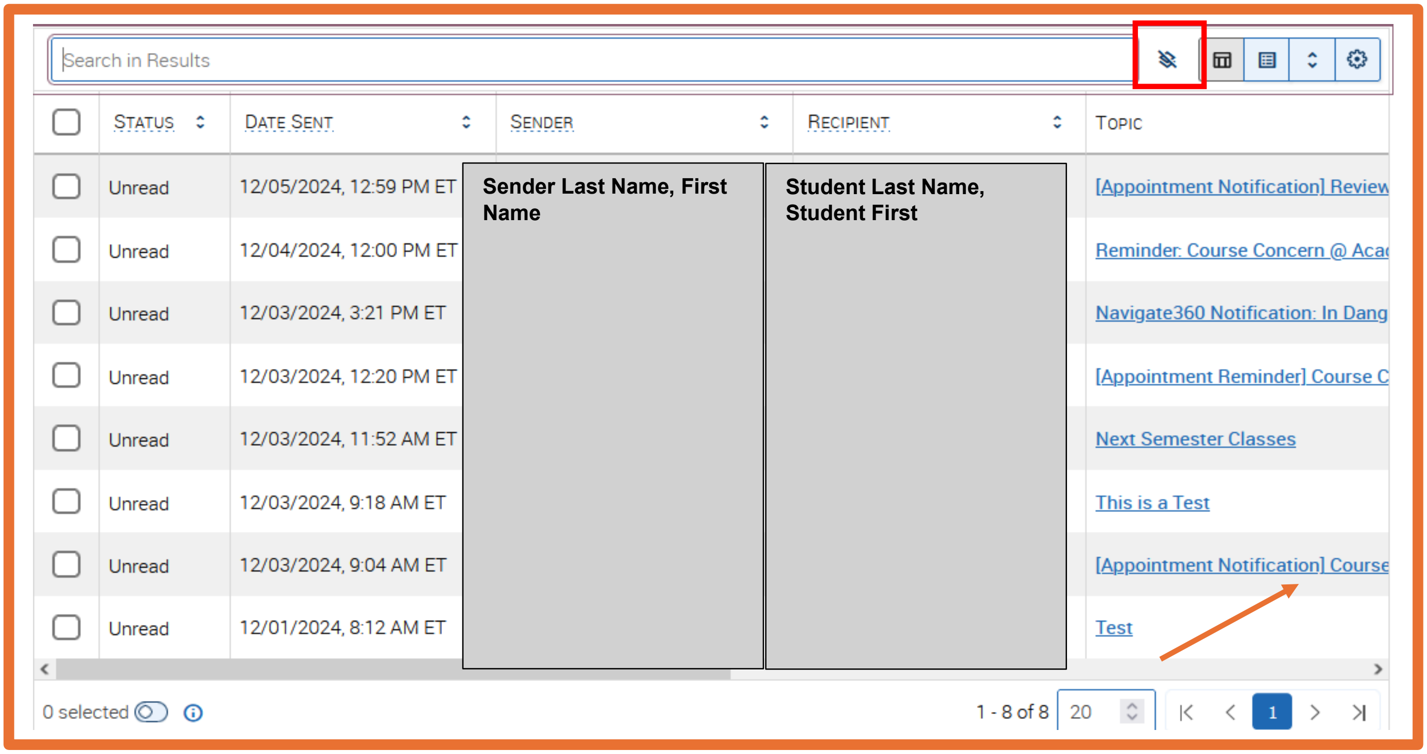


After clicking, **Clear All Sorts and Filters,** the table on the next page shows both **personal messages** and **automated messages** sent by the Navigate platform.



<u>Note:</u> After clicking, **Clear All Sorts and Filters,** the table below shows both **personal messages** and **automated messages** sent by the Navigate platform.

This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/29/2024]**



Click on the message title of any of the messages to read the contents of the message.

^ 12/03/2024 12:20pm ET From: Sara Reese

From: Sara Reese
To: Student, via Email
Subject: [Appointment Reminder] Course Concern @ 12/04/2024 12:15pm - 12:30pm ET
Date: 12/03/2024 12:20pm ET

Appointment Reminder

This is to remind you that an appointment has been scheduled for 12/04/2024 12:15pm - 12:30pm ET.
Details are included below.

Automated message of Appointment Reminder sent to student.

Organizer

Sara Reese

Topic

Course Concern

Comments

No comment provided.

Cancel/Reschedule Appointment:

Cancel Appointment

Location

Academic Advising Center

Meeting Type

In Person

Date of Appointment

12/04/2024

Time

12:15pm - 12:30pm ET