Introduction to Navigate360

For faculty instructors, graduate assistants, and/or faculty advisors

LEVEL 1

- Introducing Navigate360
- Your Professor Home Page
- Learning More About Your Students

Introducing Navigate360

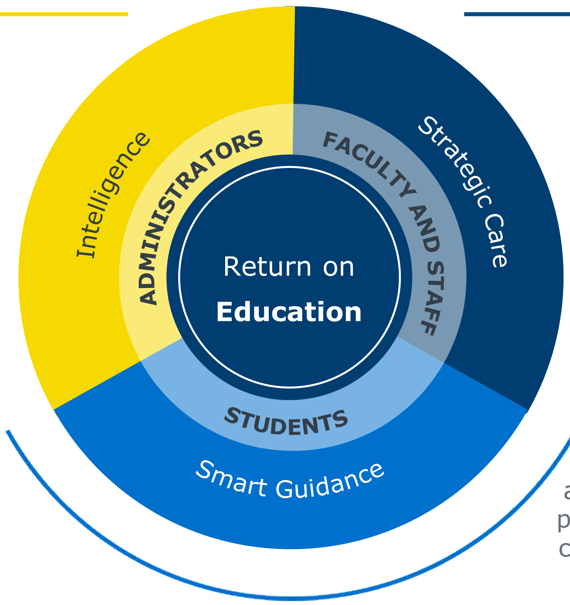
Introducing EAB's Student Success Management System (SSMS)

Our **Student Success Management System** is an **enterprise-level technology** that links administrators, advisors, deans, faculty, other staff, and students in a coordinated care network designed to help schools **proactively manage student success** and deliver a **Return on Education.**

How It Works

EAB Analytics Use Machine Learning to Turn Historical Patterns into Current Insights

Unlock the power of data analytics and machine learning to bring timely student success management **intelligence** to administrators and leaders.



Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, **strategic care.**

Provide **smart guidance** and intelligent information at the most pivotal moments students encounter in college, simplifying and structuring the student journey to completion.

Intelligence
For Administrators

Unlocking the power of SSC's data analytics

Institutions at advanced levels of SSM Intelligence consistently collect historical data from across the institution. Members use data to drive day-to-day activity and inform intervention strategy, and review data to track progress and make improvements.

Strategic Care
for Faculty and Staff

Creating a connected and coordinated support network for all students

Institutions at advanced levels of SSM Strategic Care strategically use Navigate360 to provide holistic care to all students. Members rely on cases, alerts, and campaigns to serve all students and to ensure seamless coordination between all student support offices.

Smart Guidance
for Students

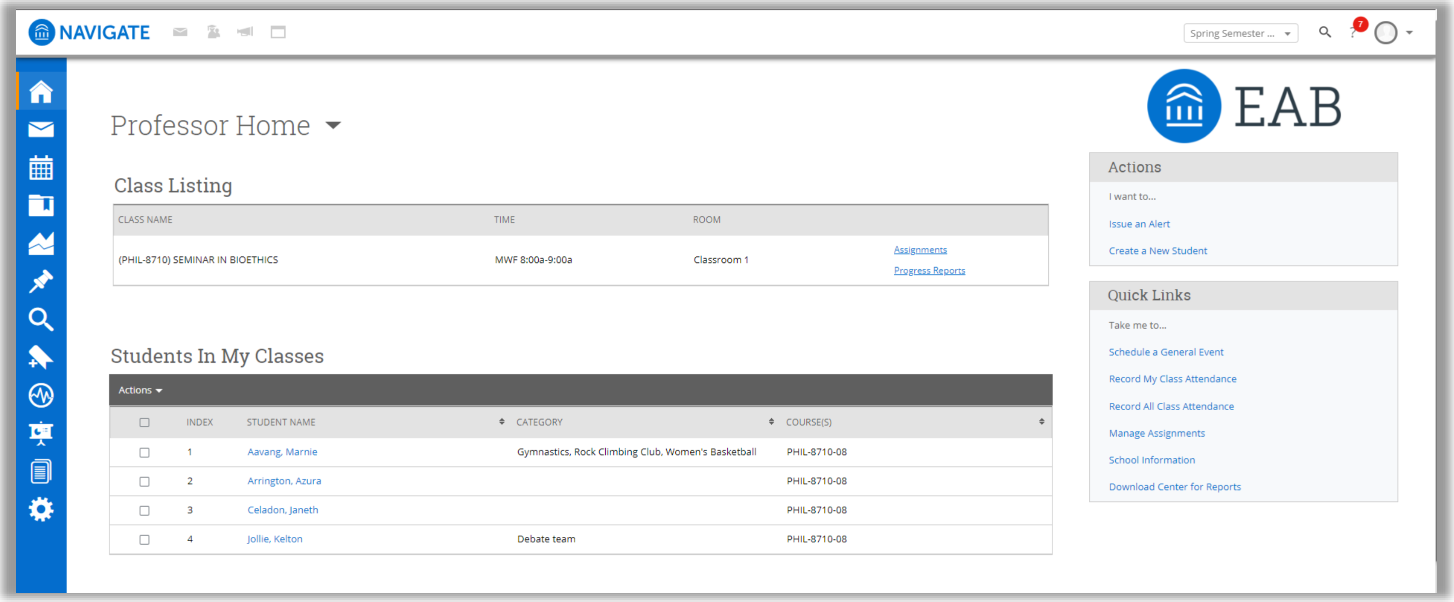
Providing curated guidance at the most pivotal moments in each student's journey

Institutions at advanced levels of SSM Smart Guidance empower students to succeed through customized, student-friendly guidance in-real time and automatically notify them when they make a misstep to help them stay on the right path.

Your Professor Home Page

The primary landing page for *faculty* – which may include professors, graduate assistants, teaching assistants, lab assistants, etc., upon logging into Navigate360.

The Professor Home page is where most faculty users arrive when opening Navigate360. It allows users to view key tools that enable them to take action on student success-related tasks, such as filling out Progress Reports, recording class attendance, or managing assignments.



Progress Reports

If you have been asked to participate in a campaign, you will usually receive email requests to submit feedback on students in your courses. However, you will also be able to fill out **Progress Reports** directly from the links at the top of the Professor Home page. Clicking on 'Fill Out Progress Reports' will direct you to the feedback form.

Class Listing

If you are a faculty member who is teaching a course in the current term, the course information will be outlined in the **Class Listing** section of the Professor Home Page. In addition to the class name, time, and room (if specified), you will also be able to view assignments or progress report campaigns for a given course by clicking the links on the right hand side of the box.

Students in My Classes

If you are a faculty member who is teaching a course in the current term, the **Students In My Classes** gives you a quick and easy way to see and interact with all of the students in your classes.
In the main student grid, you will notice several key pieces of information next to each student's name: Category and Course.

My Assigned Students

The **My Assigned Students** grid gives you an overview of the students assigned to you in your SIS for the current term. In addition to the student name, you can also see any applicable category information.

Actions Menu

The **Actions** menu is found on the right-hand side of the home page. The default action is to Issue an Alert. From this link, you are able to issue an ad hoc student alert.

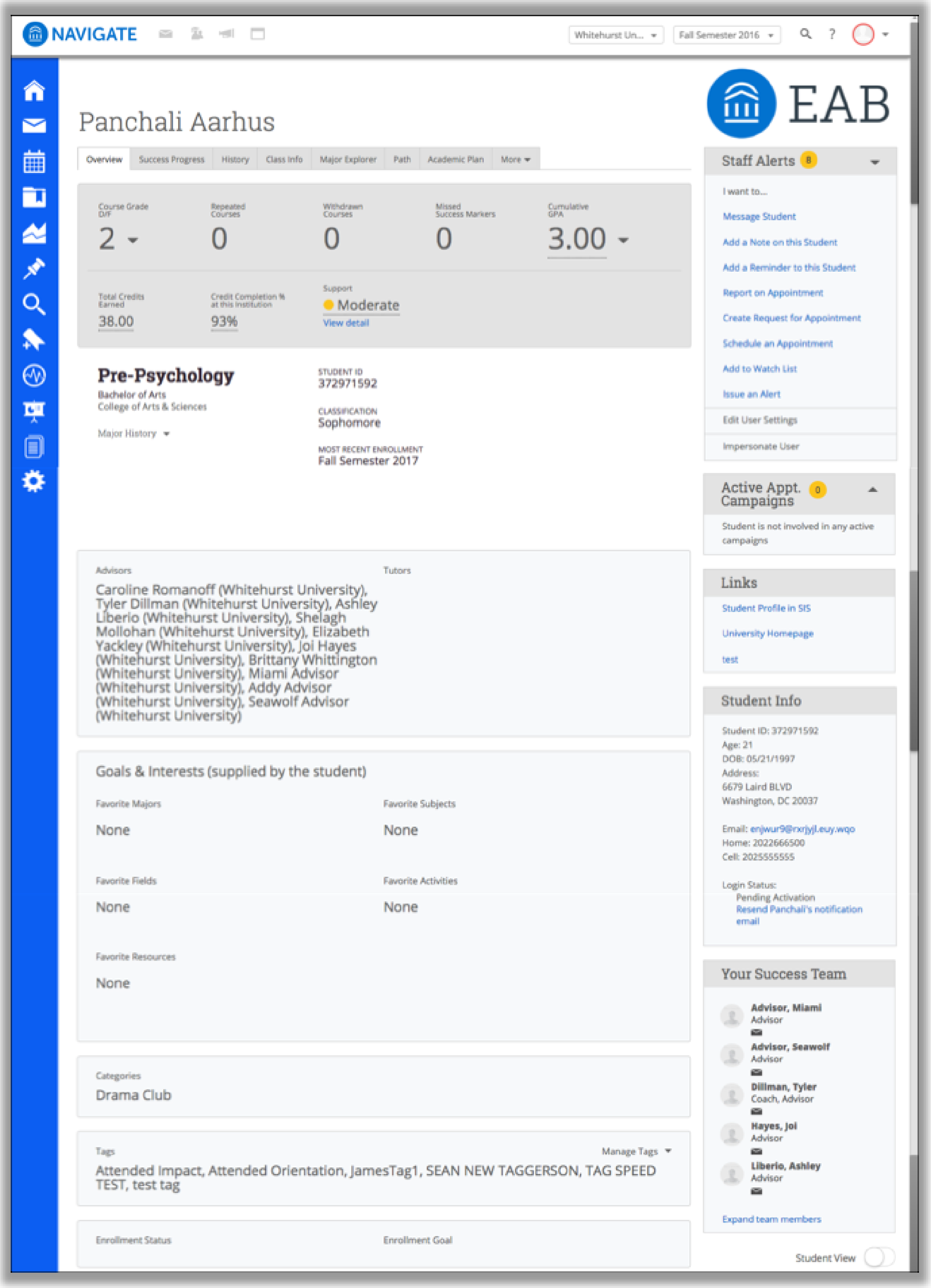
Quick Links

The **Quick Links** box is a section on your Home page that provides easy access to different features within the platform,.

Learning More About Your Students

Helping faculty learn more about a student to better inform one-on-one interactions is one of the core tenants of Navigate360.

As you prepare for an interaction with a student, whether in anticipation of sending out an Appointment Campaign or before a scheduled appointment, the Student Profile aggregates all pertinent information about that student into one place.



Key Features

- Within the **Overview Tab**, the "30-Second Gut Check" is your go-to spot for a high-level overview of a student's academic performance and progress to date.
- The information included within the **Success Progress Tab** provides additional context on a student's progression towards degree.
- The **Class Info Tab** provides information regarding a student's enrollment history, along with grades achieved and credits awarded.
- The **History Tab** aggregates all recorded activity for a student, including appointments, alerts, cases, reminders, notes, summary reports, and progress reports.

Communicating and Meeting with Students

For faculty instructors, graduate assistants, and/or faculty advisors who meet with students

LEVEL 2

- Searching for Students
- Communicating with Students
- Documenting Meetings with Students

Searching for Students

Identifying Students through Common Characteristics with Advanced Search

The Advanced Search function within Navigate360 allows you to create unique cohorts of students based on the layering of various search parameters, the results of which can be used as the foundation for building appointment campaigns or tracking student progress. Queries will pull lists of *current* students that fit the parameters of the search, and information populating in the results will be a *current* reflection of student data.

Student Information
Use this group of filters to search for students by personal identifying information, such as name, ID, gender, or race.

Term Data
Select conditions within this group of filters to run a search for students using information associated with a specific term.

Enrollment History
Create logic statements to search for students by their enrollment status in a variety of terms.

Course Data
Utilize this group of filters to query students based on courses, section, and status.

Performance Data
Search using these filters to segment student groups by GPA, credits earned, and hours attempted.

Success Indicators
Run a search using these filters to identify students based on predicted risk level or success marker completion status.

Area of Study
Combine elements of this filter to search for students based on areas of study, including college affiliation, degree, concentration, or major.

Assigned To
Enter information into fields in this bucket to pull lists of students assigned to specific advisors, tutors, or coaches.

Saved Searches

Create a *dynamic* list of students by saving unique filter combinations

Saved Searches allows users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike Watch Lists, 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

Watch Lists

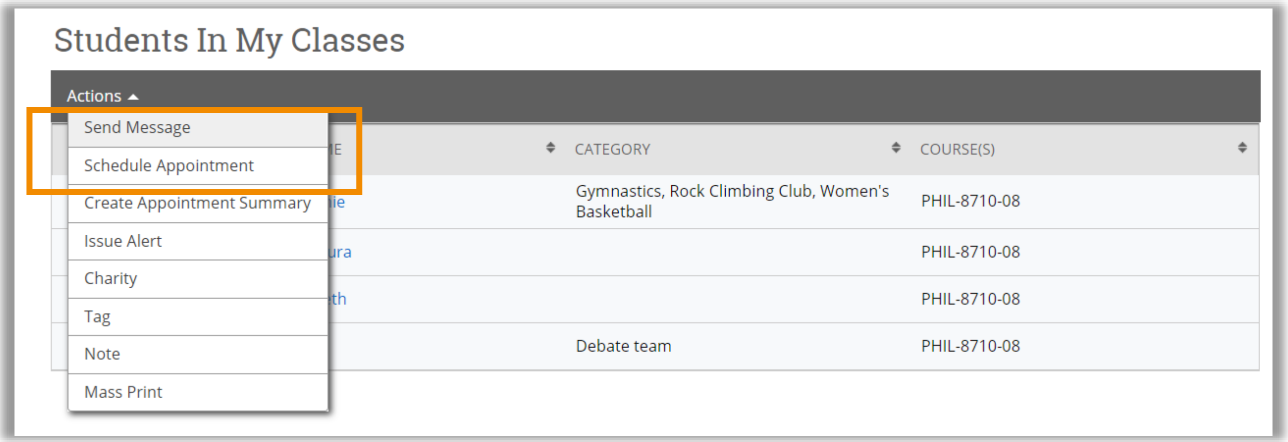
Create a *static* list of students by saving your search results

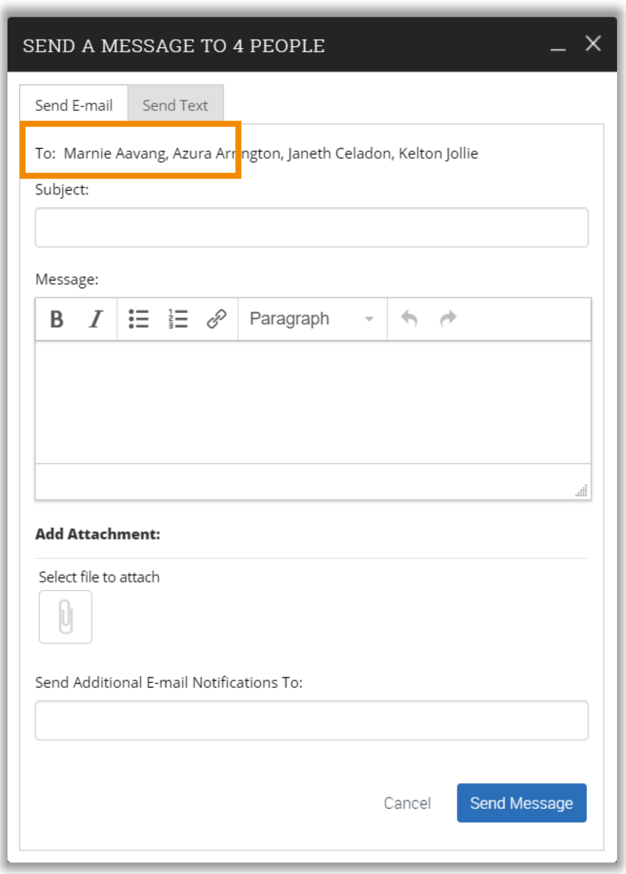
A Watch List is a static list of students by student ID. You can use Watch Lists in a variety of ways, from maintaining a list of students to track over time in Intervention Effectiveness or offline, to sending messages or appointment campaigns directly from the Watch List.

Communicating with Students

Using Navigate360 to send email and/or text messages to one student or a group of students.

The Navigate360 platform 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.





You can send emails or texts to one or more students from your professor 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.

Email
Within an email, you can include the following information:

- **Subject:** The subject line for your email message.
- **Message:** The body of your email message. There is no character limit for the message.
- **Add Attachment:** Upload attachments to the email message.
- **Send Additional E-Mail Notifications To:** Allows you to include additional students or staff you also want the email sent to.

Text
Within a Text, you can only include a Message. You are restricted to 160 characters.

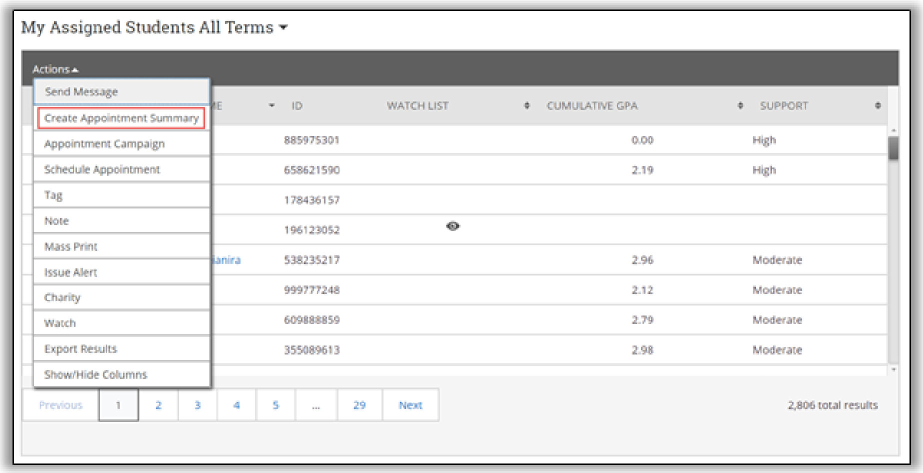
Important Note: Sending an email or text message to more than one student will blind copy all students. In other words, the student **will not** know that the message was sent to more than one student. For both email and text, it will look like the message was only sent to them.

Documenting Meetings with Students

The Navigate360 platform provides several different ways for faculty to document a student interaction. If you are documenting a meeting with a student, you should use an **Appointment Summary Report.**

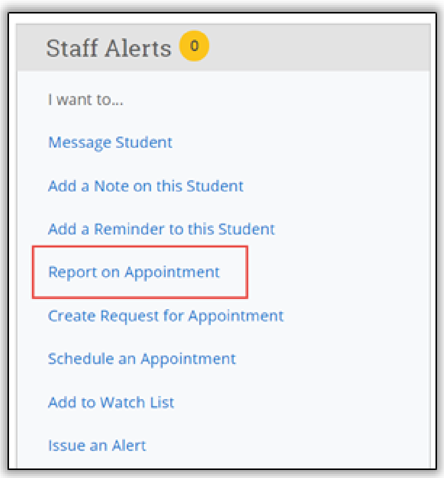
Summary reports allow you to document information pertaining to a specific student appointment. *Remember - Any information you enter into the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act.*

There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments – you will notice that "Create Appointment Summary" is an option in the Actions dropdown bar throughout the platform. The easiest way to create an ad hoc Appointment Summary Report for a walk-in appointment is from your staff homepage or a student profile.



On your Staff homepage, under the "Students" tab, 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.

You can also create an ad-hoc Appointment Summary Report from a student's profile page. Navigate360 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.



Where can I access this documentation in the future?
All Appointment Summary Reports you filed can be found in several areas of the platform – your staff home page, the individual student's profile page, or Reports.

Scheduling Meetings with Students

For faculty advisors and instructional faculty and/or graduate assistants who want to schedule meetings with students

LEVEL 3

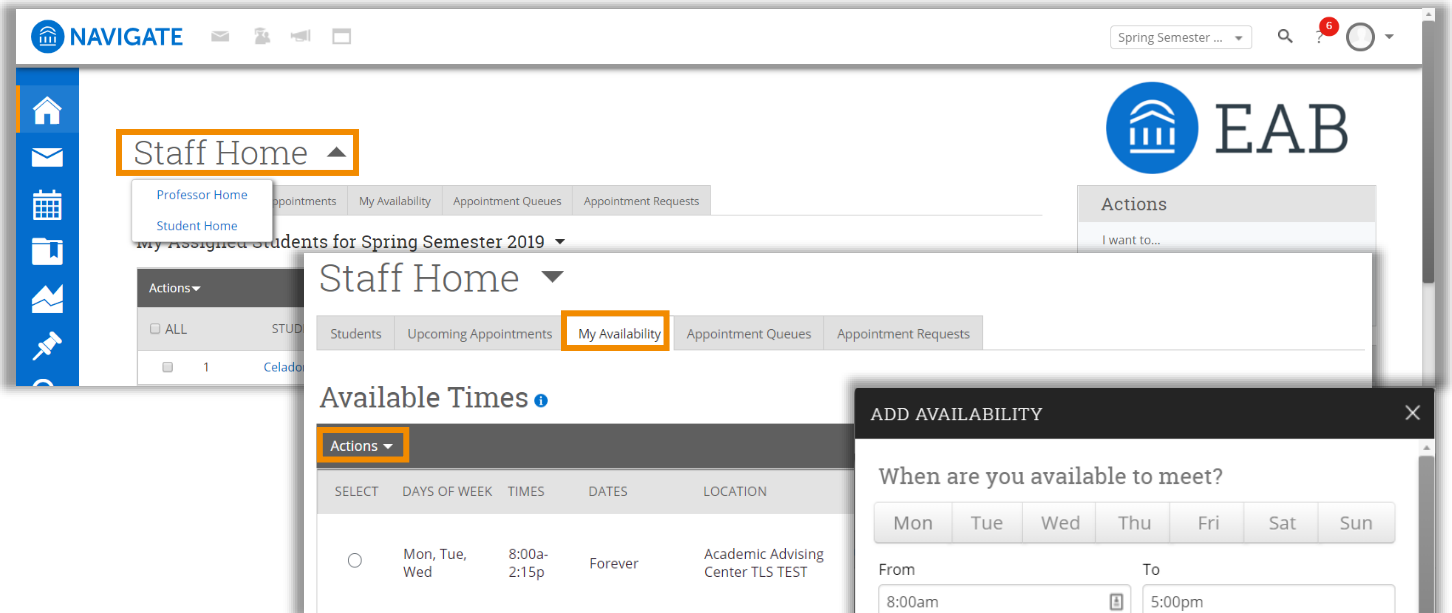
- Syncing your Calendar with Navigate360*
- Setting your Availability to Meet with Students
- Scheduling Appointments with Students

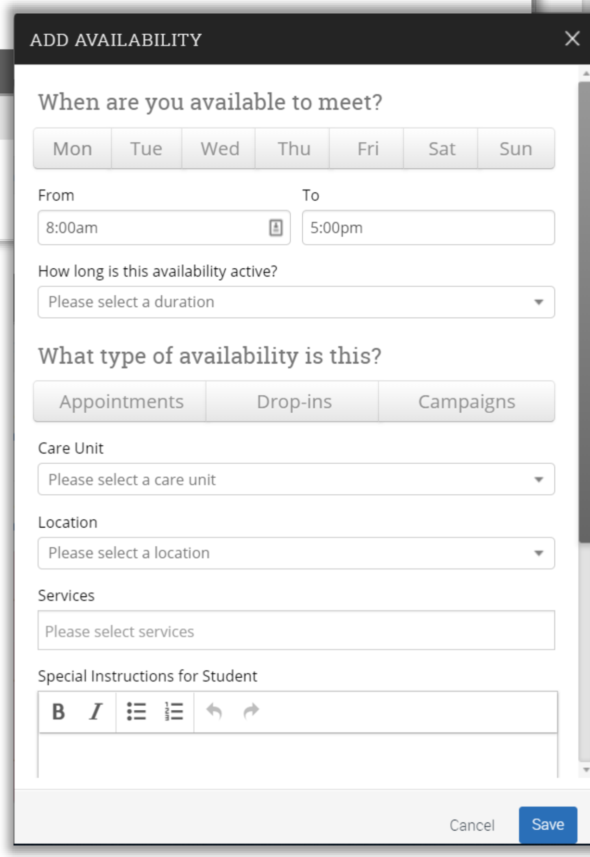
*Please see Synching with Office 365 instructions linked here in the help center

Setting Your Availability to Meet with Students

Use “Availability” in Navigate360 to allow students to see when you are available to meet for office hours and/or advising activities.

Availability can be found on the **My Availability** tab of the Staff Home screen. Availability allows faculty to indicate the days, times, locations, and services for which they are available to meet with students. You may choose to allow students to schedule appointments in advance via student or faculty initiated scheduling.





To begin, open the Actions menu on the **My Availability** tab and select **Add Time**. You can also run the Availabilities report and select **New Availability** from the Actions menu.

The Add Availability window will open. Select the days of week, time period, and duration of your availability.

Next, select the appropriate type of availability. Availability for “Appointments” allows students to initiate scheduling an appointment, while “Campaigns” availability is applicable if and when a faculty member initiates the scheduling process with a student by sending an appointment request.

Now select your Care Unit from the drop-down. This will determine which location and services the availability will be for.

After selecting the Care Unit, select a Location. Then select which student services you can provide to students during this availability.

If any Service you select is tied to a Course, a Course menu will appear and you will need to select the Course you are available for.

Click the **Save** button.

Repeat this process until all of your availabilities have been defined. You can have as many availabilities as needed.

Scheduling Appointments with Students

Appointment scheduling in Navigate360 may be initiated by either a student or a faculty member.

Students can use the Navigate Student Appointments feature to schedule advising, tutoring and other appointments on campus. An Appointment Campaign is an important feature that allows staff members to reach out to specific populations of students to encourage them to schedule appointments.

Launching an Appointment Campaign
To begin, click Appointment Campaigns in the Actions or Quick Links menu on your Staff Home Page.

Define the Campaign
In this step, you will set the criteria for your Appointment Campaign. The fields that must be filled out are listed and defined below.

> **Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student.
> **Care Unit:** Select the Care Unit the Appointment Campaign will be associated with
> **Location:** Select the location of where the appointment(s) will be held.
> **Service:** Select the Student Service that will be associated with the campaign
> **Course or Reason:** Add the reason or associated course for the campaign here. This will only appear if the Service is tied to a course
> **Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign.
> **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.
> **Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at a 5 minute length and will be determined by your configuration.
> **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.

Add Students to Campaign
After entering the details on the Define Campaign page, click **Continue**.
Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.

Add Staff to Campaign
You will need to select yourself as staff for the campaign. Add yourself to the campaign and click **Continue**.

Compose Your Message
Your next step is to compose the message that you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use merge tags. DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.

Fields used in the message composition are:
Email Subject: The topic will be the subject of the email going to the student.
Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.

After you have finished composing your message, it's time to send out your campaign!
Confirm and Send

Review your campaign details, invitees, and advisors on this page.
Click **Send** when you are ready to email the invites to the selected students.