

# FERPA – An Overview for Faculty

RJ Sweeney

Associate Registrar – Records and Registration

Office of the Registrar



# Overview:

The Family Educational Rights and Privacy Act (a.k.a. FERPA or the Buckley Amendment) is federal legislation enacted in 1974 that protects the privacy of student education records. FERPA applies to all current and former students of the University of Vermont. Once a student is attending the University, the rights afforded to parents under FERPA, if any, transfer to that student.



# What rights are granted to students under FERPA?

- Right to Inspect and Review one's own Student Education Record
- Right to Request to Amend one's own Student Education Record
- Right to Provide Written Consent prior to disclosure of Personally Identifiable
- Information, except to the extent that FERPA authorizes disclosure without consent
- Right to file a complaint with the U.S. Department of Education concerning alleged failures by the University of Vermont to comply with the requirements of FERPA



# What records are NOT education records under FERPA?

Sole Possession Records

Law Enforcement Unit Records

Employment Records

Medical Records

Post-Attendance Records



**Common exceptions to written consent include (please see [policy](#) for additional items):**

The information is considered “Directory Information”, and the student has not taken formal action to restrict its release (a confidentiality indicator would appear on their record). Directory Information is information contained in a Student Education Record that would not generally be considered harmful or an invasion of privacy if disclosed.



# Directory Information at UVM:

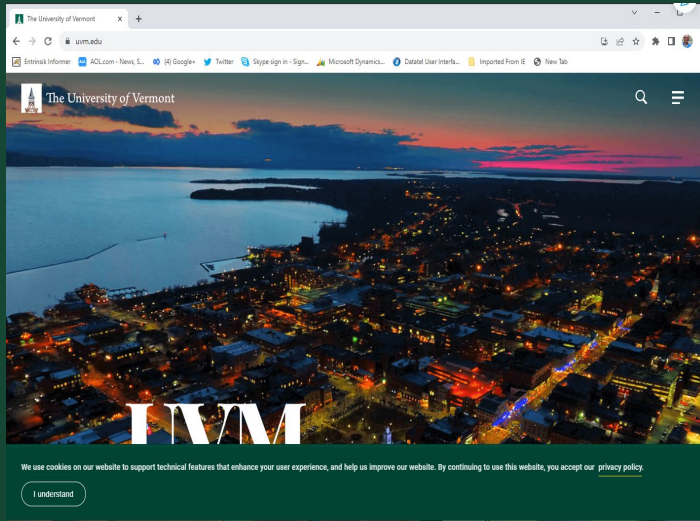
- name
- address
- telephone number
- University-issued email address
- dates of attendance
- class (grade level)
- most recent educational agency or institution(s) attended
- major field of study
- enrollment status
- awards
- honors (including Dean's list)
- degree(s) conferred (including dates)
- past and present participation in officially recognized sports and activities
- physical factors: height, weight (applies to Varsity student-athletes only)
- photograph
- Residency or other post-completion placements (applies to Larner College of Medicine students only)



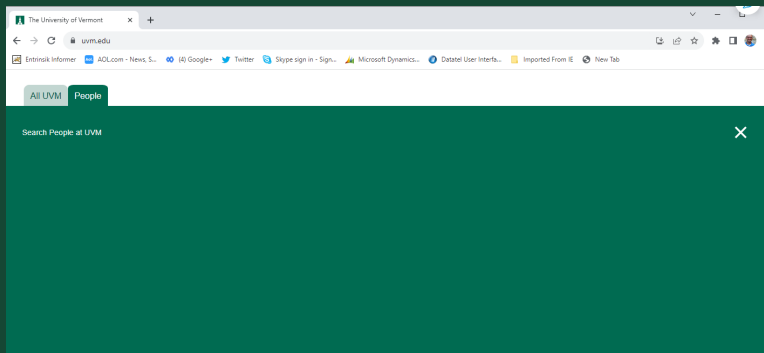
**How do I know if a student has a confidentiality flag on their record?**



#1 : Go to UVM homepage, click on the search magnifying glass icon



Select “People” tab and type in student’s name. If they do not show up on search, they may have a confidentiality flag.





### #3 In myUVM, go to your Class Roster card

- Select the correct term and click Submit
- Choose your course from the list and click Submit
- Click on the student's name



Rec No.	Pro-noun	Student Name
1	name only	Student, Preferred

#### Student/Faculty Information System (SIS)

Student Faculty Deans and Department Chairs

#### General Student Information

Pronoun: name only  
Email address: [Test.Student@uvm.edu](mailto:Test.Student@uvm.edu)

⚠ Confidential Address and Phone Number for Preferred Student

*Student Information effective from Summer 2024 to The End of Time*  
Registered for Term: No  
First Term Attended: Spring 1995  
Status: Inactive Student  
Residence: Out-of-state Resident  
Student Type: Continuing Student  
Class: First Year



# Disclosure of information from confidential educational records is limited to the eligible student or to others:

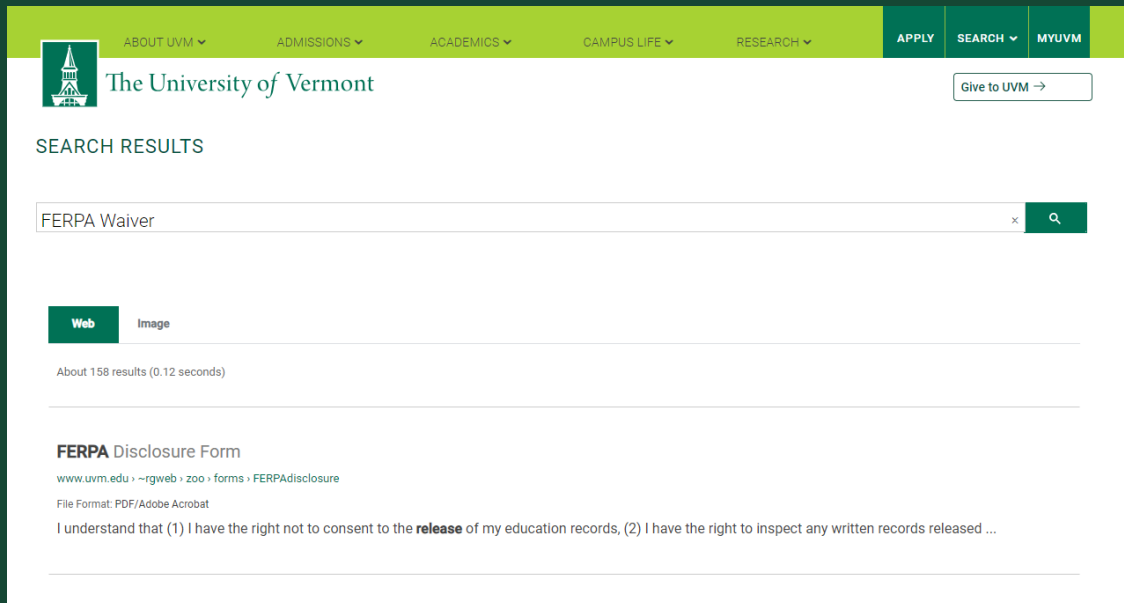
1. To whom the eligible student releases the records.
2. Who have a “Legitimate Educational Interest” - exists when a School Official needs to review a Student Education Record in order to fulfill their professional responsibility. Employment by the University does not give faculty/staff the right to view all student information.

A School Official is a person employed by the University in an administrative, supervisory, academic, research, or support staff position.




# How does a student waive their FERPA rights?

Where to find the university FERPA disclosure (waiver) form



The screenshot shows the top navigation bar of The University of Vermont website with links for ABOUT UVM, ADMISSIONS, ACADEMICS, CAMPUS LIFE, RESEARCH, APPLY, SEARCH, and MYUVM. The search bar contains the text "FERPA Waiver" and shows "About 158 results (0.12 seconds)". The first result is titled "FERPA Disclosure Form" and includes the URL "www.uvm.edu > ~rgweb > zoo > forms > FERPAdisclosure" and the file format "PDF/Adobe Acrobat". The text of the form begins with "I understand that (1) I have the right not to consent to the release of my education records, (2) I have the right to inspect any written records released ...".

ABOUT UVM ▾ ADMISSIONS ▾ ACADEMICS ▾ CAMPUS LIFE ▾ RESEARCH ▾ APPLY SEARCH ▾ MYUVM

 The University of Vermont [Give to UVM →](#)

SEARCH RESULTS

FERPA Waiver x 🔍

Web Image

About 158 results (0.12 seconds)

**FERPA** Disclosure Form

[www.uvm.edu > ~rgweb > zoo > forms > FERPAdisclosure](#)

File Format: PDF/Adobe Acrobat

I understand that (1) I have the right not to consent to the **release** of my education records, (2) I have the right to inspect any written records released ...



### Form for Disclosure of Student Records

**To:**

\_\_\_\_\_  
[Name of University of Vermont Department/Unit Holding Records]

**From:**

Student's First Name	Middle Initial	Last Name	NetID
Permanent Street Address	City	State	Zip Code

The Family Educational Rights and Privacy Act of 1974 (FERPA) establishes the privacy rights of students with regard to educational records which are not classified as directory information. The Act requires, in most instances, prior consent from the student for disclosure of such records to third parties. See UVM's FERPA Rights Disclosure Policy, <https://www.uvm.edu/policies/student/ferpa.pdf>

**I hereby authorize UVM to disclose the following records or information:**

**Individual to Receive Records:**

[Name] \_\_\_\_\_

[Address] \_\_\_\_\_  
\_\_\_\_\_

**Purpose of Disclosure:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Description of Records/Information to be Disclosed:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I understand that (1) I have the right not to consent to the release of my education records, (2) I have the right to inspect any written records released pursuant to this consent, and (3) I have the right to revoke this consent at any time by delivering a written revocation to the Custodian of Records.

This authorization will remain valid for the current academic year, unless I sooner revoke it in writing. A copy of this authorization will serve as a valid consent.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# Testing your FERPA knowledge



**Is UVM required to release directory  
information?**



# NO

**UVM is NOT obligated to release directory information, except under certain circumstances. FERPA states only that an institution MAY release information. When in doubt about whether information is directory information, or if you have an uneasy feeling about why it's being requested, do NOT release it.**

**In addition, you should always ask why the information is being requested.**



**Is access to student information the  
right of every University of Vermont  
staff or faculty member?**



# NO

**Only employees with a LEGITIMATE EDUCATIONAL INTEREST should have access to student information. For legitimate educational interest to exist, a school official must need to review an education record in order to fulfill their professional responsibilities to the University.**

**Employment by the University does not give faculty/staff the right to view all student information.**

**Access to student information does not give faculty/staff the right to view just any student record.**



**A student's parent calls to ask how their child is doing in a class. Can you provide this information without the consent of the student?**



# NO

**Even if the caller is the student's parent and may be paying for the student's education, you cannot give the parent information about how their student is doing in a class without the written consent of the student.**



**An unauthorized person retrieves information from a computer screen that was left unattended. Under FERPA, is the University responsible?**



# YES

**Information on a computer screen should be treated the same as printed documentation.**

**The medium in which the information is held is unimportant.  
Student information should not be left accessible or unattended,  
including computer displays.**



**You get a frantic phone call from someone who says he is a student's father and must get in touch with their child immediately because of a family emergency.**

**Can you tell him when and where their next class is today?**



# NO

**For the safety of the student, you cannot tell another person where a student is at any time. Inform the caller that they should contact UVM Police Services or the Registrar's Office for more information.**



**Is an advisor required to let a student inspect and review their personal notes about the student that are kept in a file in the desk of the advisor's office?**

**These are files that have not been shared with others.**



# NO

**"Sole possession" records are an exception to the definition of "education records" and are therefore not accessible to the student. As their title implies, records of this nature are only required to be accessible to the sole owner, which in this case would be the advisor.**

**Remember to keep in mind that once an instructor enters any notes into the Advisor Notes application in myUVM, they become part of the student's educational record.**



**Do FERPA rights continue after a student has graduated from UVM?**



# YES

**Former students have FERPA rights like current students. FERPA protection lasts for life.**



# FERPA “Danger Zones” for Faculty and Staff

- Circulating a printed class list with student name and Student ID number or grades as an attendance roster.
- Discussing the progress of any student with anyone other than the student without the consent of the student (e.g. parents, employers, other students).
- Sharing student education record information, including grades or grade point averages, with other faculty or staff members of the University unless their official responsibilities identify their “legitimate educational interest” in that information for that student.
- Providing anyone with lists of students enrolled in your classes for any commercial purpose.
- Providing anyone with student schedules or assisting anyone other than university employees in finding a student on campus.
- Giving out directory information about a student who has requested confidentiality without their consent.
- Including personally identifiable information about student “A” in student “B’s” record without student A’s permission.
- Including FERPA protected information in a letter of reference without the student’s written permission (this includes the student’s GPA or grade in your class).



# UVM FERPA Policy

<https://www.uvm.edu/sites/default/files/UVM-Policies/policies/ferpa.pdf>

**When in doubt, err on the side of caution and do not release student educational information. Contact the Office of the Registrar for guidance**



# Questions?



# Navigate360 – A powerful student success platform

August 19, 2024

RJ Sweeney

Associate Registrar



# NAVIGATE360

## Navigate360

- Advanced Search
- Referrals and case management
- Appointment reports and shared notes
- Early alerts
- Intervention campaigns
- Front desk management

Desktop and App driven **appointment scheduling**.

**Connect Network** links students to their support team

## Navigate360 for Students

- Personalized student path
- Intake survey
- Quick polls
- Push Notifications
- Student calendar
- Holds Center
- Major Explorer
- Campus Resources



# STUDENT APPLICATION

## STAY ENGAGED

To-Do List, Calendar, and Appointment Scheduling

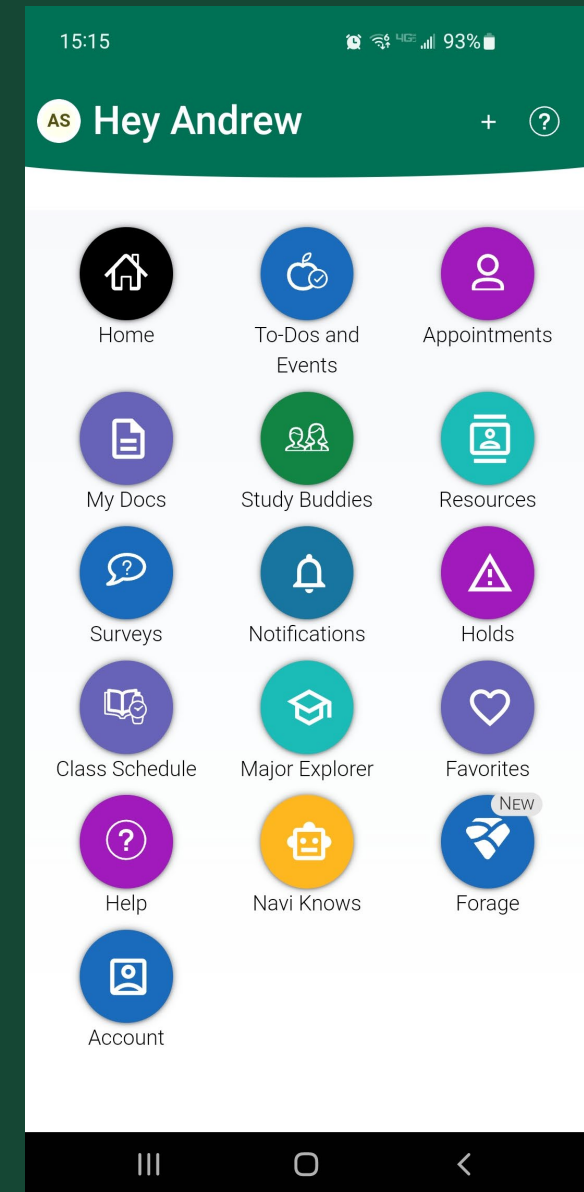
## BE PROACTIVE

Learn about and resolve holds, find study buddies, explore major and career options, ask Navi Knows AI bot

## KEEP ORGANIZED

Access campus resources

View course schedule





# 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.

## 3 ways to issue an alert

1. **Professor Home – ad hoc**
2. **Student Profile – from the Actions menu**
3. **Professor Home – from student lists**



# Faculty Advising

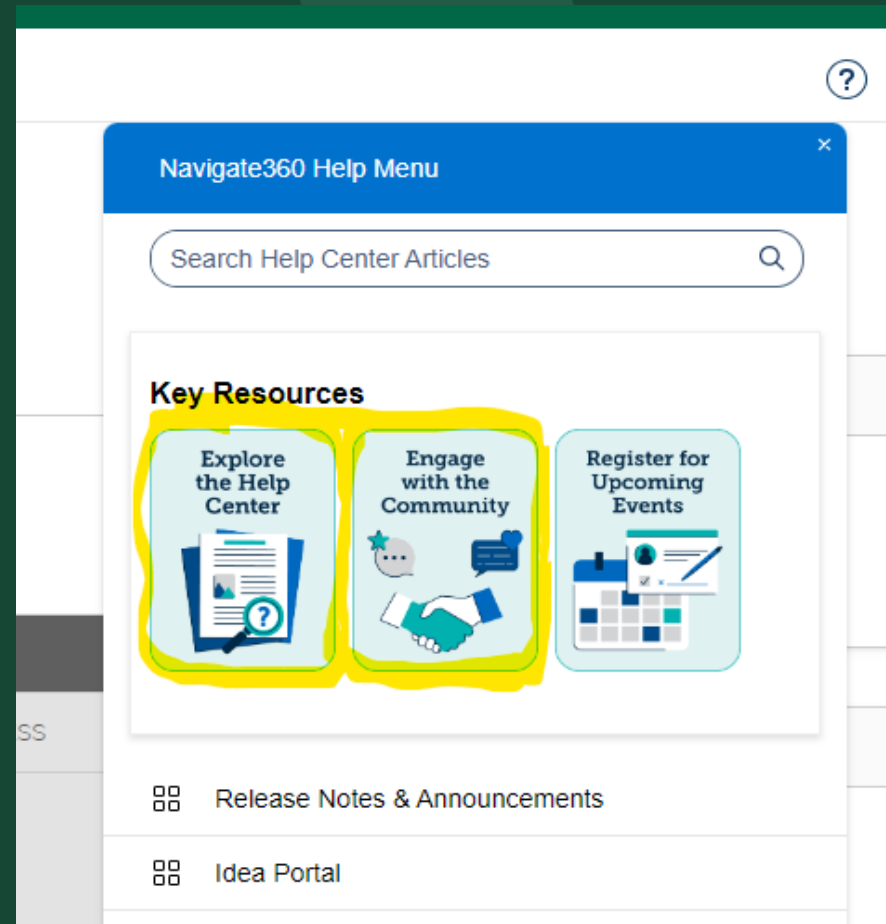
Navigate360 gives you many tools that will make administrative and advising tasks easier

1. **Scheduled availability for office hours and student appointments.**
2. **FERPA compliant collaborative advising notes space.**
3. **Trackable alert cases and referrals to other campus offices**



# Navigate360

## Help Center





# **Registrar 101**

August 19, 2024

**FERPA**

**Tools & Resources**

**RJ Sweeney**

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363 Waterman Bldg.

(802) 656-0573

[rsweene3@uvm.edu](mailto:rsweene3@uvm.edu)

**Veronika Carter**

University Registrar  
363 Waterman Bldg.

(802) 656-0589

[vlcarter@uvm.edu](mailto:vlcarter@uvm.edu)



# **FERPA: A GUIDE FOR FACULTY**

<https://www.uvm.edu/sites/default/files/UVM-Policies/policies/ferpa.pdf>

## **Overview:**

The Family Educational Rights and Privacy Act (a.k.a. FERPA or the Buckley Amendment) is federal legislation enacted in 1974 that protects the privacy of student education records. FERPA applies to all current and former students of the University of Vermont. Once a student is in attendance at the University, the rights afforded to parents under FERPA, if any, transfer to that student.

## **What rights are granted to students under FERPA?**

- Right to Inspect and Review one's own Student Education Record
- Right to Request to Amend one's own Student Education Record
- Right to Provide Written Consent prior to disclosure of Personally Identifiable Information, except to the extent that FERPA authorizes disclosure without consent
- Right to file a complaint with the U.S. Department of Education concerning alleged failures by the University of Vermont to comply with the requirements of FERPA

## **What records are NOT education records under FERPA?**

- Sole Possession Records
  - records which are in the sole possession of the maker, are used only as a personal memory aid, and which are not accessible or revealed to any other person except a temporary substitute for the maker of the record.
- Law Enforcement Unit Records
- Employment Records
  - employment records relating to university students who are employed as a result of their status as students are considered education records.
- Medical Records
- Post-Attendance Records
  - records created or received by the University of Vermont after an individual is no longer a student in attendance and that are not directly related to their attendance as a student.



**Common exceptions to written consent include (please see [policy](#) for additional items):**

- The information is considered “Directory Information”, and the student has not taken formal action to restrict its release (a confidentiality indicator would appear on their record). Directory Information is information contained in a Student Education Record that would not generally be considered harmful or an invasion of privacy if disclosed.

At the University of Vermont, Directory Information is comprised of the following:

- name
- address
- telephone number
- University-issued email address
- dates of attendance
- class (grade level)
- most recent educational agency or institution(s) attended
- major field of study
- enrollment status
- awards
- honors (including Dean’s list)
- degree(s) conferred (including dates)
- past and present participation in officially recognized sports and activities
- physical factors: height, weight (applies to Varsity student-athletes only)
- photograph
- Residency or other post-completion placements (applies to Larner College of Medicine students only)

**Disclosure of information from confidential educational records is limited to the eligible student or to others:**

1. To whom the eligible student releases the records.
2. Who have a “Legitimate Educational Interest” - exists when a School Official needs to review a Student Education Record to fulfill their professional responsibility. A School Official is a person employed by the University in an administrative, supervisory, academic, research, or support staff position.



## **FERPA “Danger Zones” for Faculty (not related to posting of grades):**

- Circulating a printed class list with student name and Student ID number or grades as an attendance roster.
- Discussing the progress of any student with anyone other than the student without the consent of the student (e.g. parents, employers, other students).
- Sharing student education record information, including grades or grade point averages, with other faculty or staff members of the University unless their official responsibilities identify their “legitimate educational interest” in that information for that student.
- Providing anyone with lists of students enrolled in your classes for any commercial purpose.
- Providing anyone with student schedules or assisting anyone other than university employees in finding a student on campus.
- Giving out directory information about a student who has requested confidentiality without their consent.
- Including personally identifiable information about student “A” in student “B’s” record without student A’s permission.
- Including FERPA protected information in a letter of reference without the student’s written permission (this includes the student’s GPA or grade in your class).

## **To avoid FERPA “Danger Zones” related to the posting of grades, MAKE SURE TO:**

- Never leave graded tests in a stack for students to pick up by sorting through the papers of all students.
- Never **require** students to use social security numbers, student ID numbers, birthdays, phone numbers, or derivatives of those numbers. Use a pin number that only the faculty member and the student know.
- Never link the name of a student with that student's ID number in any public manner.
- Never post the grades, even if coded, in alphabetical order or any other recognizable order.
- Post grades only for students who have given written consent for such a posting.
- Use e-mail as a last resort. While emailing grades is permissible under FERPA, the Department of Ed has ruled that an institution will be held responsible for a violation if any unauthorized individual sees the grade via your electronic transmission.
- If you are giving out grades or other FERPA protected information over the phone, make sure that the person you are speaking to is the student. Ask questions that only the student could answer, such as the name of the course and the term it was taken, an example of an assignment from the course, or questions that were on the final exam.

**When in doubt, err on the side of caution and do not release student educational information. Contact the Office of the Registrar for guidance.**



## Tools & Resources

### myUVM (Experience)

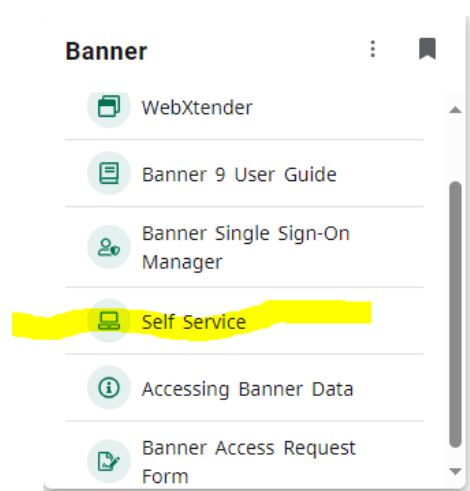
[Home - myUVM \(elluciancloud.com\)](https://elluciancloud.com)

### Registrar's Office website

<https://www.uvm.edu/registrar>

### QUICK ACCESS TO TEACHING AND ADVISING TOOLS:

#### Banner card



#### Student/Faculty Information System (SIS)



#### Advisee List

#### Class Roster

#### Degree Audit

#### Entering Final Grades

#### Faculty Forms and Instructions

#### Grade Change Request

#### Registration Override

#### Expanded Section Description



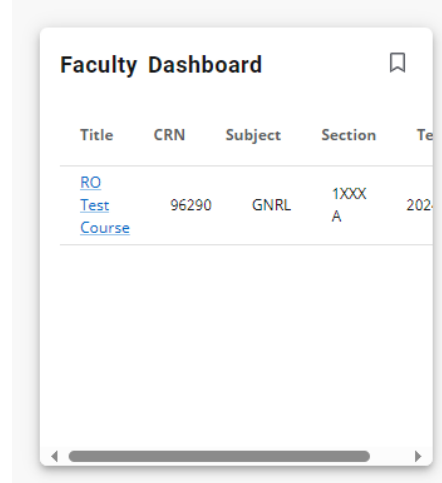
## Class Roster / Faculty Dashboard

### Class Roster Addition: Faculty

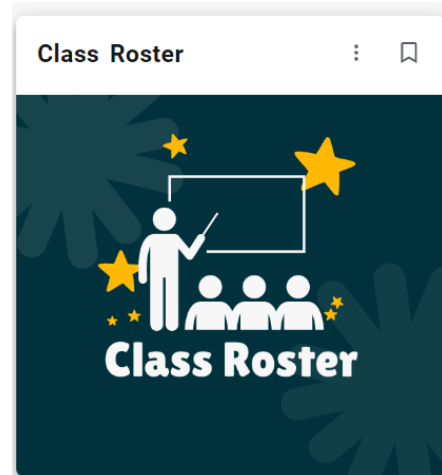
To add a student to your class roster electronically (after the add/drop period is over):

Log into myUVM

Select your **Faculty Dashboard** card.



OR Class Roster card



Select the course - click on the icon (people) next to the title of your course. It is a link to your class roster.



Class Roster

Cross List always appears in the Enrollment Counts area. If the section is not cross listed, 0's will display in the enrollment columns. Please click [Other Options](#) for Email, CSV (Excel) output or Class Photos.

Please note: Once the student has been graded, the Enrollment Change Features are no longer available. Please use the Grade Change Exception process instead.

Course Information

RO Test Course - GNRL 1XXX A

CRN: 96290

Duration: Aug 26, 2024 - Dec 06, 2024

Status: Active

Instructional Method: Lecture

Grading Mode: Normal A-F

Scheduled Meeting Times

Time Days Where

Date Range

Instructors

TBA

ON CAMPUS SEE NOTES

Aug 26, 2024 - Dec 06, 2024

Veronika Lorenc Carter, David Michael Alles, Naima T Dennis, Jennifer Kay Fath, Pamela Jean Harris, Rhonda Jacobs Hayward, Adam James Howard, Charlotte Lau, Max R Medina, Lucie Ann Pecor, Lucie Srostlik

Enrollment Counts

Maximum

Actual

Remaining

Enrollment: 0

1

-1

Cross List: 0

0

0

Rec No.	Pro-noun	Student Name	ID	Attribute	Level	Major	Degree	Class	Credits	Reg Status	Reg Date	XLst CRN	Enrollment Change	Academic Alert	Email	NetId
1	name only	Student, Preferred	000000001		UG *	PSYS	BA	First Year	0.000	You are registered! (RO)	Jun 28, 2024		Request	Update	Email	tstudent

Email Class (excluding Withdrawn students)

CSV (Excel) Output

Display Photos Size (Height): ☒ Small - 75 pixels ☐ Medium - 125 ☐ Large - 175 Photos across: 5

If you want students added to your course, please ask the students to add themselves using myUVM.

Enrollment Change Request Options:

Enrollment Change Request

Never Attended

This feature will be available once the class begins.

Disenrollment

☐ Did not meet prerequisites  
Preferred Student, 000000001, does not meet the prerequisites for section 96290 of GNRL 1XXX A "RO Test Course" fo the Fall 2024 term. This email is your notification that Preferred Student has been dropped from the course.

☐ Did not meet attendance requirement  
Preferred Student, 000000001, did not meet the attendance requirement as stated in the disenrollment policy for secti 96290 of GNRL 1XXX A "RO Test Course" for the Fall 2024 term. This email is your notification that Preferred Student h been dropped from the course.  
The disenrollment attendance requirement states: The instructor has the right to disenroll any student who fails to atte a scheduled course by the third instructional day of a semester or the second scheduled class session of a course, whichever comes later, unless the student has notified the instructor and has been excused.

Credit Change

Section Change

Please ask the student to change Credits or Section themselves using MyUVM.

Optional Post Script (P.S.):

Submit

Submission details depend on the option selected above. Please select an option.

Never Attended

Disenrollment – Prerequisite checks, or Attendance Requirements

Credit change

Section change

Add a student

7



## Enrollment Change Request: Faculty (after the add/drop period is over)

In order to process an enrollment change for the current semester, please log into myUVM.

Select your **Faculty Dashboard** or **Class Roster** card and click on the class roster for the course.

On the right you will see a heading that says Enrollment Change.

Click [Request](#) adjacent to the student's name and you will get a form (see above) that gives you different options for the change.

Click on the button for Credit (or Section, or Disenrollment or Never Attended) and put the correct information in the space.

When finished, click Submit.

## Academic Alert

Open your Class Roster and click on Update adjacent to the student's name:

Class Roster

[RETURN TO FACULTY AND ADVISOR MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Cross List always appears in the Enrollment Counts area. If the section is not cross listed, O's will display in the enrollment columns.  
Please click [Other Options](#) for Email, CSV (Excel) output or Class Photos.  
Please note: Once the student has been graded, the Enrollment Change Features are no longer available. Please use the Grade Change Exception process instead.

**Course Information**  
RO Test Course - GNRL 1XXX A  
CRN: 96290  
Duration: Aug 26, 2024 - Dec 06, 2024  
Status: Active  
Instructional Method: Lecture  
Grading Mode: Normal A-F

**Scheduled Meeting Times**

Time	Days	Where	Date Range	Instructors
1BA	ON CAMPUS	SEE NOTES	Aug 26, 2024 - Dec 06, 2024	Veronika Lorenc Carter, David Michael Alles, Naima T Dennis, Jennifer Kay Fath, Pamela Jean Harris, Rhonda Jacobs Hayward, Adam James Howard, Charlotte Lau, Max R Medina, Lucie Ann Pecor, Lucie Srostlik

**Enrollment Counts**

	Maximum	Actual	Remaining
Enrollment:	0	1	-1
Cross List:	0	0	0

Rec No.	Pro-noun	Student Name	ID	Attribute	Level	Major	Degree	Class	Credits	Reg Status	Reg Date	XLst CRN	Enrollment Change	Academic Alert	Email	NetId
1	name only	Student, Preferred	000000001		UG *	PSYS	BA	First Year	0.000	You are registered! (RO)	Jun 28, 2024		<a href="#">Request</a>	<a href="#">Update</a>	<a href="#">Email</a>	tstudent

[Email Class](#) (excluding Withdrawn students)

[CSV \(Excel\) Output](#)

[Display Photos](#) Size (Height): ☒ Small - 75 pixels ☐ Medium - 125 ☐ Large - 175 Photos across:

If you want students added to your course, please ask the students to add themselves using myUVM.

## Display/Send Academic Alert Letter

Please review the generated letter and add your comments in the space provided. You may use your own words, or copy-and-paste any of the following examples:

- You have not been attending class regularly or have had several absences.
- You have been arriving late for class or leaving early.
- You have not turned in assignments, or assignments have been turned in late.
- You have been receiving poor grades on assignments, quizzes or exams.
- You have not been prepared for class.
- You have not been participating in class discussions.
- Your classroom behavior is of concern/has been disruptive/can be inappropriate.

Mid-Term Warning: If your academic performance continues at this level, you will no doubt earn a poor grade and may be in danger of failing.

Aug 02, 2024

Dear Preferred Student,

I am writing because I am concerned about your performance in my Fall 2024 GNRL 1XXX A "RO Test Course" class.

I urge you to contact me to seek help in improving your performance. Please see me during my office hours or make an appointment by talking with me after class or emailing [Rhonda.Hayward@uvm.edu](mailto:Rhonda.Hayward@uvm.edu).

Please note that your academic advisor(s) will receive notification of this letter. I recommend that you contact your advisor Gail Starks at [gstarks@uvm.edu](mailto:gstarks@uvm.edu) to discuss strategies for improving your performance.

Here is a link to a list of additional campus resources that may be helpful to you: <https://www.uvm.edu/academicsuccess/AcademicAlert>

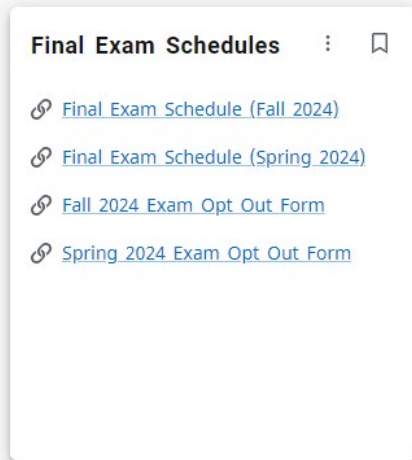
Your academic success is important to me, your advisor(s), and others at UVM. While we will do all we can to assist you, it is up to you to take the initiative.

Sincerely,  
Rhonda J. Hayward

**RECOMMENDED: Use Brightspace Classlist to communicate with your students.**



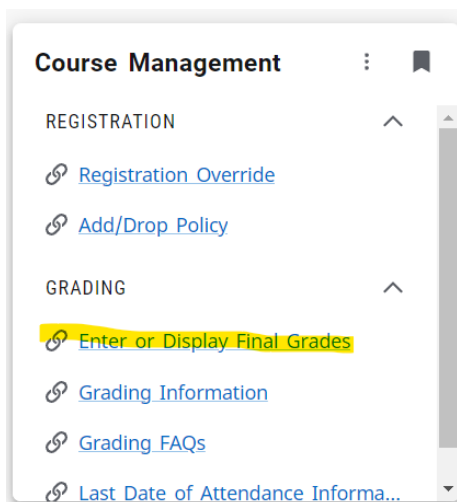
## Final Exams



The final exam schedule for the newest SOC is posted a few weeks after Registration opens.

## Grading

Grades must be reported to the Registrar's office as soon as possible after the course is completed but not later than 72 hours after the final examination for that course. If the final exam is on the Friday of exam week, grades are due by noon on the following Tuesday.



Select your **Course Management** card.

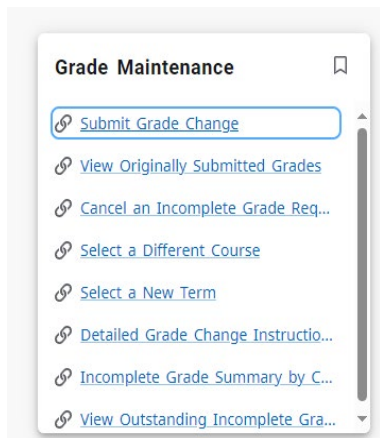
Click on 'Enter or Display Final Grades'.

Click the course title to navigate to the final grade submission page. Use the drop-down menu to select a grade for each student and press Submit.

**Please note:** If a student Never Attended the class, please use the *Enrollment Change* column in the *Class Roster (this is found on your Faculty Dashboard card)* to communicate this. **Or**, if there is a W already on the final grade sheet for a student who never attended, please perform a *Grade Change Exception Request* (ask the Registrar's Office for instructions, if you do not know how to do this).



## **Grade Changes**



Select your **Grade Maintenance** card

Click on Submit Grade Change- If it defaults to the wrong term, go back and click on "Select a New Term"

Select your course

For each student, click "Request Change"

Select appropriate grade and reason for requested change.

Click "Submit"

The request will be sent to the associate dean for approval. It will take effect immediately. When the process is complete you and the student will be emailed

## **Grade Change Exception Requests**

Select your **Grade Maintenance** card

Click on Submit Grade Change

Select the Term (if it defaults to the wrong term, back up and click "Select a New Term")

Select the Course

On the far right of the student's name, click "Request Change"

At the bottom of the screen, click on "Go to Enter Exception Request"

In the new grade field, enter 'NA' and in the Description box, enter reason (e.g. 'never attended') or for an incomplete, enter 'I' in the new grade field and the explanation in the Description box. Please be sure to use the specific grades listed: NA for never attended, I for incomplete.

Click 'Submit'

The request will be sent to the associate dean for approval. If approved, it will be forwarded to our office for processing. When the processing is complete, you and the student will be emailed

**NOTE: Grade Change Exception Requests can only be used to change a grade (A-F, or W) to I (incomplete) or NA (never attended). It cannot be used to change an I to a W \* if an incomplete needs to be changed to a W it should be processed as a regular late withdrawal per a request from the dean's office.**



**When a student who never attended your course withdraws, please follow these instructions to make a grade change exception request from W (withdrawn) to NA (ever attended)**

Select your **Grade Maintenance** card

Click on Submit Grade Change

Submit the Term

Select the Course

In the 'Request' column, click on 'Withdrawn' and that takes you directly to the Exception Request

Enter NA in the New Grade Box and a comment like 'student never attended',

Click 'Submit'

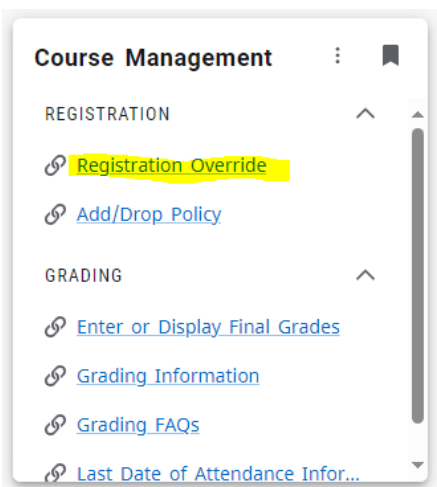
This goes into Pending Status until the Dean's Office approves it. If approved, it will be forwarded to our office for processing. When processing is complete, you and the student will be emailed.

Please let us know if you have any questions.

### **Registration Overrides**

To process an electronic override:

Select your **Course Management** card.



Click on Registration override.

**(This option is available until the end of the add/ drop period.)**

Select term

Select course from the drop-down menu

Do not fill in Subject and Course(Number)

Enter student ID or netID

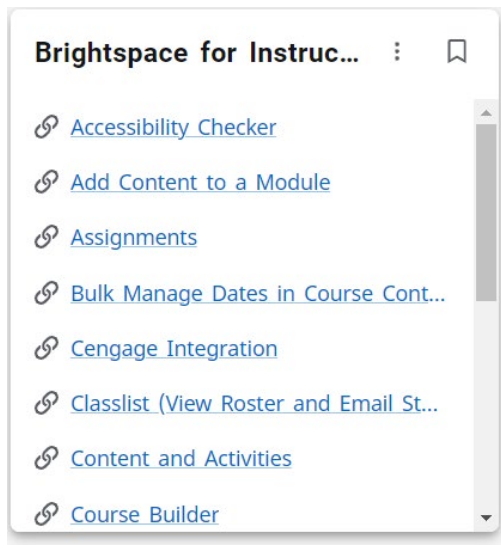
Choose as many overrides as apply

Click Perform Overrides(s)

NOTE: Students need instructor permission after the first 5 instructional days of the semester to add a course.



## **BRIGHTSPACE INFORMATION**



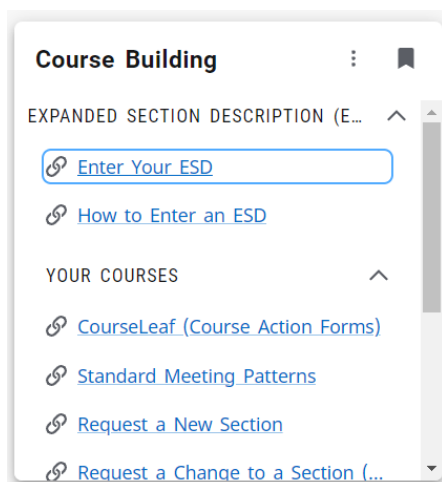
**Brightspace support:** [TechTeam@uvm.edu](mailto:TechTeam@uvm.edu)

## **SCHEDULE OF COURSES INFORMATION**

**UVM Schedule of Courses:** <https://soc.uvm.edu/>

### **Course Building**

<https://www.uvm.edu/registrar/course-building>



### **Expanded Section Descriptions**

Select your **Course Building** card



Click on:

How to Enter an ESD or Enter Your ESD

**Standard Meeting Patterns**

<https://www.uvm.edu/registrar/standard-meeting-patterns>

**Classroom Scheduling**

<https://www.uvm.edu/registrar/classroom-scheduling>

**Verify Your Courses for Next term**

<https://myuvm.uvm.edu/web/home-community/resources>





UVM has launched the EAB Navigate platform for advisors, faculty, and staff with the goal of helping students explore a path to timely graduation completion with data, services, and supportive connections. Use this Quick Start Guide to make the most of your experience.

Login to EAB Navigate using your university credentials!  
<https://uvm.campus.eab.com>

## Perform These Key Actions to Identify, Communication With, and Support Students

- **Reference the Student Profile** –After clicking on a student's name through your Professor Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student's profile
- **Issue an Alert** -Use this feature to submit an early alert on a student who may be at risk. This can be done ad hoc or through progress reports.
- **Mass Email a Group of Students** –Use 'Send a Message' from the 'Actions' drop-down to contact student in your courses list.

UNIVERSITY OF VERMONT

Navigate360 | STUDENT SUCCESS

# Professor Home

The University of Vermont

## Courses

Term: Fall 2024

COURSE NAME	DAYS/TIMES	
(GNRL-1XXX) 1000 Level GNRL	<b>Begins on 08/26/2024</b> 08/26/2024 - 12/06/2024 ONCMP-SEE NOTES	<a href="#">Assignments</a> <a href="#">Progress Reports</a>

## Students In My Courses

Term: Summer 2024 (Default ...)

Actions

INDEX

STUDENT NAME

CATEGORY

COURSE(S)

No students found

Actions

I want to...
[Issue an Alert](#)
[Upload Profile Picture](#)

Quick Links

Take me to...
[Schedule an Appointment](#)
[Record My Class Attendance](#)
[Record All Class Attendance](#)
[Manage Assignments](#)
[School Information](#)
[Download Center for Reports](#)



# Student Profile

**Overview:** On the professor home, click on a student's name to navigate to their profile. On the overview page, find information regarding the student's past academic performance, major history, and predicted risk level.



Overview

Success Progress

History

Courses

Path

Academic Plan

Journeys

More

Course Grade  
D/F

0

Repeated  
Courses

4

Withdrawn  
Courses

2

Missed  
Success Markers

0

Cumulative  
GPA

3.57

Total Credits  
Earned

123.00

Credit Completion %  
at this Institution

84%

Overview

Agroecology & Landscape Design  
Bachelor of Science  
with a concentration in ALD: Agroecology  
College of Agric & Life Sci

Student ID  
~~XXXXXXXXXX~~

Classification  
Senior

Most Recent Enrollment  
Spring 2024

Additional Roles  
[Advisor](#), [Professor](#), [Super\\_user](#)

**Class Info:** Click on the Courses Info tab to see the courses a student is enrolled in for the current term as well as any assignments and the student's unofficial academic transcript.

## Courses

Term: Fall 2024

Actions						
<input type="checkbox"/>	COURSE	PROFESSOR	DAYS/TIMES	MID	FINAL	ABSENCE
<input type="checkbox"/>	COAE-2660-A Intro to Comm Entrepreneurship	<a href="#">Trisha Shrum</a>	Begins on 08/26/2024 08/26/2024 - 12/06/2024 TR 2:50pm - 4:05pm ET LAFAYE-L108			<a href="#">0/0</a>
<input type="checkbox"/>	NR-2030-A Ecology, Ecosystems & Environ	<a href="#">Maria Barrios-Garcia</a> <a href="#">Mariano Rodriguez-Cebal</a>	Begins on 08/26/2024 08/26/2024 - 12/06/2024 TR 10:05am - 11:20am ET ML SCI-235			<a href="#">0/0</a>

## Assignments

Term: Summer 2024 (Default...)

COURSE	DUE DATE	ASSIGNMENT	STATUS	ACTIONS
There are no course assignments listed for this student.				

## Term Details

Fall 2024					Term at a glance	
-- (3)	COAE2660IL	Intro to Comm Entrepreneurship	RW		Credits:	-
-- (3)	NR2030IL	Ecology, Ecosystems & Environ	RW		Credit Comp %:	-
					Term GPA:	-
					Cum GPA:	3.57
					Academic Standing:	
Spring 2024					Term at a glance	
1	PSS1990IX	Special Topics	A-		Credits:	6
1	PSS2210IX	Indoor Plants	A-		Credit Comp %:	100%



## Three ways to Issue An Alert

**1. Professor Home:** On the right hand side of the professor homepage, click Submit an Alert. When using this method a student must be selected using a name or student ID to search for them. The alert dialogue box also asks for the reason(s) the student needs assistance, users will choose from a pre-set list of reasons that the SSC Leadership Team has created. Additional fields on the alert dialogue box are the option to select if the concern is related to a specific course and to add any comments related to the issue or referral.

**UNIVERSITY OF VERMONT**

Navigate360 | STUDENT SUCCESS

**Professor Home**

Courses

Term: Fall 2024

COURSE NAME	DAYS/TIMES
(GNRL-1XXX) 1000 Level GNRL	Begins on 08/26/2024 08/26/2024 - 12/06/2024 ONCMP-SEE NOTES

[Assignments](#)  
[Progress Reports](#)

The University of Vermont

Actions

I want to...

**Issue an Alert**

[Upload Profile Picture](#)

Quick Links

Take me to...

[Schedule an Appointment](#)

ISSUE AN ALERT

Student

Please select a reason

Select at least one

Is this associated with a specific class?

Optional

Additional Comments

Please enter a comment.

Cancel

Submit



# Issue an Alert

## Three Ways to Issue an Alert

2. **Professor Home:** On the professor home page, scroll down to Students in My Classes. Click on the box beside a student name. Click on Actions on the gray toolbar and choose Issue Alert. When using this method the student's name will be auto-filled in the dialogue box.

### Students In My Classes

Actions ▴		STUDENT NAME	CATEGORY	COURSE(S)	AT RISK?
<div>Send Message</div> <div>Issue Alert</div> <div>Note</div>		Student A		ECON-S202-KD1	No
<input checked="" type="checkbox"/>	2	Student B		ECON-S100-KD1	No
<input type="checkbox"/>	3	Student C		ECON-S100-KD1	No
<input type="checkbox"/>	4	Student D		ECON-S202-KD1	No

ISSUE ALERT

Student Hannah Mitchell

Please select the reason you believe this student needs assistance

Is this alert associated with a specific class?

Additional Comments

Please enter a comment.

Drop - Student Never Commenced Attendance

Challenges with Technology Related to Course

Academic Difficulty Due to Personal Issues Outside Classroom

Submit

Cancel

3. **Student's Profile:** Use the Quick Search to find the student with whom you met. Once on the student's profile, navigate to the right hand menu. In the "I Want To..." actions section there will be an option to Issue an Alert.

Staff Alerts 20

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report On Advising Appointment

Report On Tutoring

Schedule an Appointment


Add to Watch List

Issue an Alert



# Progress Reports

**Filling Out Progress Reports:** As a faculty member you will receive an email during the semester prompting you to provide feedback on students in your courses. The email will be similar to the below:



## Student Feedback Request

Dear Professor Lynch,


Faculty - please fill out a progress report for your course.

[Click to Begin Entering Student Feedback](#)  
The link above expires on 11/30/2016. If you would like to provide feedback after the expiration above, please contact your administrator.

If you have trouble with the above link, copy and paste this address into your browser:  
<https://kirsten.gradesfirst.com/e/jZ05hZMybE>

By clicking on the link within this email you will be taken to a web page that displays the courses you teach and the class roster for those courses. You will be asked to report on whether the students are of concern in your course and why; you are able to provide as many reasons as apply. You are then able to provide optional information on the absences and grades of the student as well as share any additional context. Only those students for whom you are concerned about need to be marked, the un-marked students can be submitted as not of concern in the course by clicking the blue button at the bottom of the screen once finished.

## Student Feedback

**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 Lynch:**  
You 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.

ACCT225-6 INTRO TO FINANCIAL ACCT

Student Name	At-Risk to Fail Your Class?	Alert Reasons (You must choose at-least one if the student is at risk)	Absences	Grade	Comments
1 <b>Angell, Eric</b> Student ID: 6437233	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons			
2 <b>Bligs, Shannon</b> Student ID: 1008552	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons			
3 <b>Kelley, Chris</b> Student ID: 1163221	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons			
4 <b>Mopar, Roy</b> Student ID: 1163147	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons			

Submit only marked students (but I'm not done)

This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

Submit unmarked students as not At-Risk (I'm all done)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.



# Message a Student

**Home:** From any Home screen with either students assigned or students enrolled in a course, messages can be issued by selecting the box beside the student's name(s) and choosing the Send Message option from the Actions dropdown. When using this method the student's name and therefore institution-specific email address will be auto-filled in the dialogue box.

### Students In My Classes

Actions		STUDENT NAME	CATEGORY	COURSE(S)	AT RISK?
<input type="checkbox"/>		Student A		ECON-S202-KD1	No
<input checked="" type="checkbox"/>	2	Student B		ECON-S100-KD1	No
<input type="checkbox"/>	3	Student C		ECON-S100-KD1	No
<input type="checkbox"/>	4	Student D		ECON-S202-KD1	No

SEND A MESSAGE TO CALLA BEACH

Send E-mail

Send Text

To: Calla Beach

Subject:

Message:

Add Attachment:

Select file to attach

Send Additional E-mail Notifications To:

Cancel

Send Message





# Introduction to Navigate360

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

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LEVEL

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

1



# Introducing Navigate360

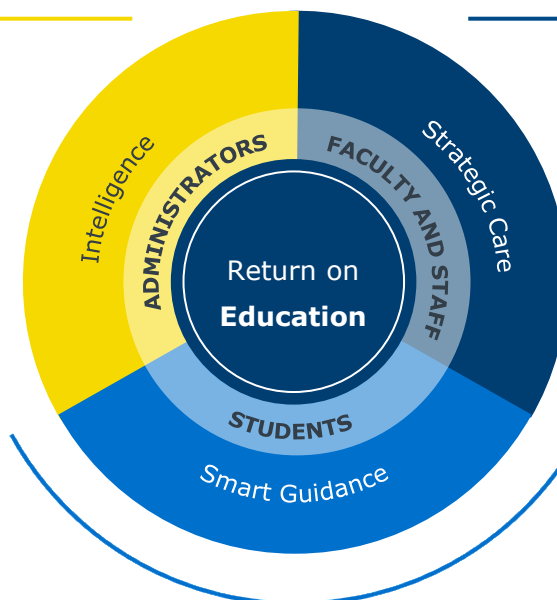
## Introducing EAB's Student Success Management System (SSMS)

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.

The screenshot shows the Professor Home page in Navigate360. The page has a blue sidebar on the left with navigation icons. The main content area is white and contains the following sections:

- Professor Home**: A dropdown menu.
- Class Listing**: A table with columns: CLASS NAME, TIME, ROOM, and links for Assignments and Progress Reports.
- Students In My Classes**: A table with columns: INDEX, STUDENT NAME, CATEGORY, and COURSE(S).

The right sidebar contains two sections:

- Actions**: A list of actions including 'I want to...', 'Issue an Alert', and 'Create a New Student'.
- Quick Links**: A list of quick links including 'Take me to...', 'Schedule a General Event', 'Record My Class Attendance', 'Record All Class Attendance', 'Manage Assignments', 'School Information', and 'Download Center for Reports'.

## 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.

The screenshot displays the EAB Navigate360 interface for a student named Panchali Aarhus. The interface is divided into several sections:

- Header:** Includes the NAVIGATE logo, institution name (Whitehurst Un...), semester (Fall Semester 2016), and a search bar.
- Student Profile:** Displays the student's name, EAB logo, and tabs for Overview, Success Progress, History, Class Info, Major Explorer, Path, Academic Plan, and More.
- Overview Tab:** Shows key metrics: Course Grade D/F (2), Repeated Courses (0), Withdrawn Courses (0), Missed Success Markers (0), Cumulative GPA (3.00), Total Credits Earned (38.00), Credit Completion % (93%), and Support level (Moderate).
- Pre-Psychology:** Lists the student's major, degree, and college, along with their major history.
- Advisors:** Lists the student's advisors, including Caroline Romanoff, Tyler Dillman, Ashley Liberio, Shelagh Mollohan, Elizabeth Yackley, Jol Hayes, Brittany Whittington, Miami Advisor, Addy Advisor, and Seawolf Advisor.
- Goals & Interests:** Displays the student's favorite majors, subjects, fields, activities, and resources.
- Categories:** Lists the student's categories, including Drama Club.
- Tags:** Displays the student's tags, including Attended Impact, Attended Orientation, JamesTag1, SEAN NEW TAGGERSON, TAG SPEED TEST, and test tag.
- Enrollment Status:** Shows the student's enrollment status and goal.
- Staff Alerts:** Provides a list of alerts and actions, such as 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, Edit User Settings, and Impersonate User.
- Active Appt. Campaigns:** Shows the student's active appointment campaigns.
- Links:** Provides links to the Student Profile in SIS, University Homepage, and test.
- Student Info:** Displays the student's personal information, including ID, age, DOB, address, email, home, cell, and login status.
- Your Success Team:** Lists the student's success team members, including Advisor, Miami, Advisor, Seawolf, Dillman, Tyler, Hayes, Jol, Liberio, Ashley, and Expand team members.

## 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

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

2



# 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

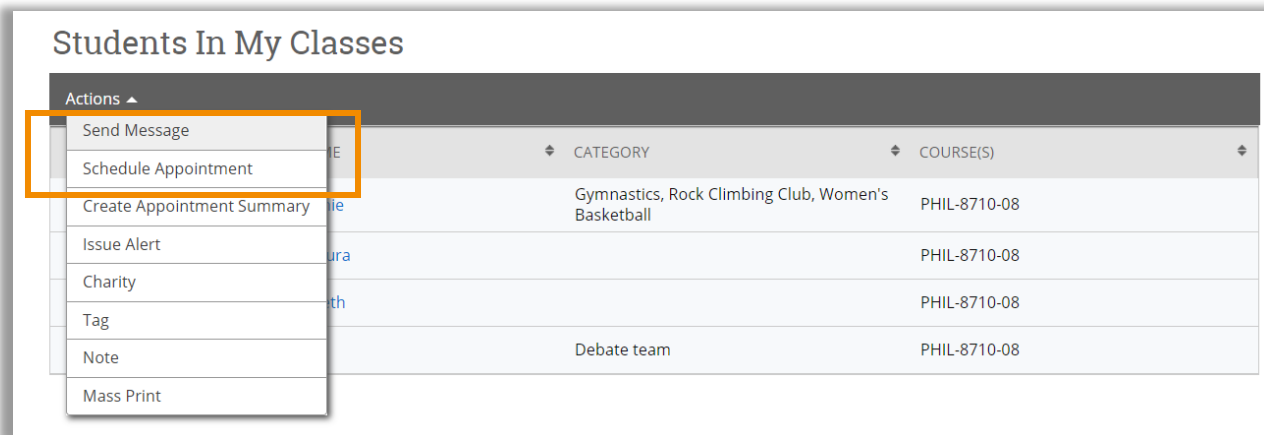
A Watch List is a static list of students by student ID. You can use Watch Lists in a variety of ways, from maintaining a list of students to track over time in Intervention Effectiveness or offline, to sending messages or appointment campaigns directly from the Watch List.



# 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.



The screenshot shows the 'SEND A MESSAGE TO 4 PEOPLE' dialog box. It has tabs for 'Send E-mail' and 'Send Text'. The 'To' field is populated with 'Marnie Aavang, Azura Arrington, Janeth Celadon, Kelton Jollie'. The 'Subject' field is empty. The 'Message' field has a rich text editor with bold, italic, bulleted list, numbered list, link, and paragraph options. The 'Add Attachment' section has a 'Select file to attach' button and a file upload icon. The 'Send Additional E-mail Notifications To' field is empty. At the bottom are 'Cancel' and 'Send Message' buttons.

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.

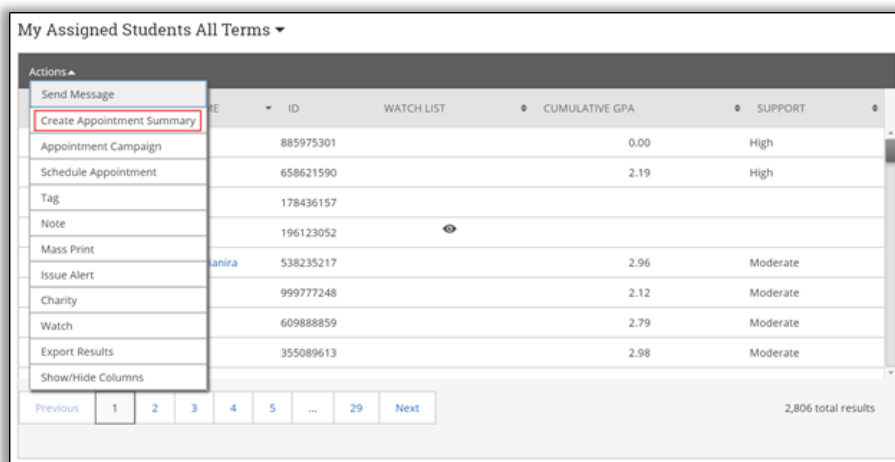


# Documenting Meetings with Students

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.

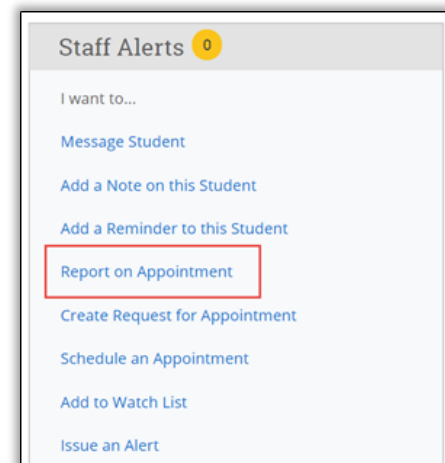


On your Staff homepage, under the “Students” tab, find the specific student in your “My Assigned Students” section, or click the drop down to find the student from one of your saved Lists. From this section, you can click on a student and select “Create Appointment Summary” from the Actions drop down. 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.

The screenshot displays the EAB Navigate360 Staff Home interface. The 'My Availability' tab is selected and highlighted with an orange box. The 'Add Availability' modal window is open, showing options to select days of the week, time period, duration, and type of availability (Appointments, Drop-ins, or Campaigns). The modal also includes fields for Care Unit, Location, Services, and Special Instructions for Student.

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.