



EAB

Student Success Collaborative™
Navigate

Navigate Staff Features Overview



Smart Student Profile

Comprehensive View of Student Risk and Progress

Success Markers

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

4 missed markers

Notification	Outcome
BIO120N Recommended grade: B (1 course) Complete between 15 and 30 credits	Needs attention 1 Attempt
BIO120K and CHEM120K Recommended grade: C+ (2 courses) Complete between 30 and 45 credits	Needs attention 2 Attempts
CHEM121K Recommended grade: B (1 course) Complete between 0 and 15 credits	Needs attention 1 Attempt
MATH105, MATH113 or Higher Recommended grade: B (1 course) Complete between 15 and 30 credits	Needs attention 2 Attempts

Key Takeaways

- “Smart View” of academic factors to assess student’s progress
- Shared notes and reporting to centralize documentation on students
- Progress indicators and key academic metrics identify if student may be at risk
- Student-generated data from the mobile application will be visible in student profiles*



“Previously, we were advising based primarily on gut instinct. Now, we have all the data to give them an objective sense of where they are and what they can do to improve. The conversation has changed dramatically.”

Navigate Advisor

*Interactions with Intake Survey, Quick Polls, Major Explorer, Journey progress, and Favorited Resources will be shown

Advanced Search

Generate Lists of Students for Strategic Use or Day to Day Work



The screenshot shows the NAVIGATE Advanced Search interface. At the top left is the NAVIGATE logo with a blue circular icon containing a white building. To the right of the logo are icons for mail, a person, a speaker, a folder, and a 'New' button. Below the header is a vertical sidebar with icons for calendar, document, line graph, pushpin, magnifying glass, location pin, pulse line, graduation cap, document with checkmark, and a gear. The main content area is titled 'New Search' and features a 'Saved Searches' dropdown menu. Below this are two input fields: 'Keywords (First Name, Last Name, E-mail, Student ID)?' and 'Type?' with a dropdown menu currently set to 'Students'. The interface lists several filter categories: 'Student Information' (First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List), 'Enrollment History' (Enrollment Terms), 'Area of Study' (College/School, Degree, Concentration, Major), 'Performance Data' (GPA, Hours, Credits), 'Term Data' (Classification, Section Tag, Term GPA), 'Course Data' (Course, Section, Status), and 'Assigned To' (Advisor, Tutor, Coach).

Key Takeaways

- Layer multiple search filters for easy list generation and student identification
- Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis
- Individual users can save dynamic and static lists of students to access later on
- Take immediate action from your Advanced Search by selecting applicable students. Message, initiate an Appointment Campaign, or take Notes on a group of students.

Advising Summary Reports & Notes



Track Details of Student Interactions to Facilitate Coordinated Care Network

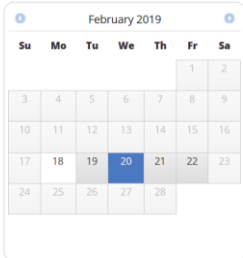
Key Takeaways

- Advisors and Faculty may take notes on students after specific interactions, or to track need-to-know information about students
- Notes and Appointment Reports are saved on the Student Profile, and other staff may view them (based off of institution specific permissions)
- Notes facilitate knowledge-sharing across advisors and other Care Units.
- Administrators can view Note details in aggregate via Reporting built in to Navigate.

Appointment Campaigns

Target and Track At-Risk Students for Advising Appointments

Choose A Day



Choose A Time

Wed, Feb 20

- 8:00am
- 8:45am
- 9:30am
- 10:15am
- 11:00am
- 11:45am

Comments



Is there anything specific you would like to discuss?

Comments...

You will be sent an email reminder to inrjyoz3@eeugbi.syz.alp the morning of your appointment.

You will be sent a text reminder to 2025555555 the morning of your appointment. [\[change\]](#)

[Review Appointment Details](#)

NAME	STATS
 Fall Advising <small>ADVISING 08/18/2017 - 11/30/2017</small>	● Appcs. Made (100%) ● Reports Created (100%) ● Attend. Rate (100%)
 Re-Enrollment Campaign <small>ADVISING [Expired] 08/18/2017 - 09/01/2017</small>	● Appcs. Made (7%) ● Reports Created (33%) ● Attend. Rate (3%)

Key Takeaways

- Create outreach campaigns targeting specific student cohorts to schedule advising appointments with dedicated link
- Individual advisors can monitor and track the progress of their campaigns, view which students responded, and send follow-up reminders for those who haven't
- Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis

Email and Text Messaging with Students

Tools for Centrally Tracked and Flexible Communication with Students

Conversation with David Johnson

Via SMS 12/15/2014
From: David Johnson
To: Mark Miller
 I'm thinking of changing majors. What's my next step?

Via email 12/15/2014
From: Mark Miller
To: David Johnson
 Let's talk at your degree planning check in that's coming up. Do you have any majors of interest?

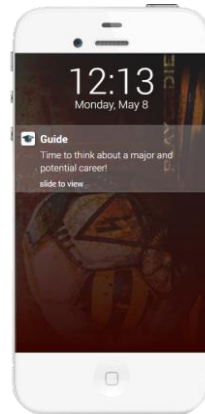
Via email 12/15/2014
From: David Johnson
To: Mark Miller
 I'm thinking Business or Psychology.

Via SMS 1/12/2014
From: David Johnson
To: Mark Miller

Ulan Derrig

Overview Success Progress Reports / Notes Class Info Major Explorer More

Galina, Ben	Text - Hello Ulan Derrig! you have been ...	05/26/2016 09:25 AM
White, Emily	[Appointment Reminder] General Appointment @ 05/05/2016 8:00a-8:30a - Appointment Reminder This is to r...	05/05/2016 07:54 AM
Person, Unknown	[Appointment Notification] General Advising @ May 04 2016 11:00a-12:00p - Appointment ScheduledAn appointm...	05/04/2016 09:24 PM
White, Emily	[Appointment Notification] General Appointment @ May 05 2016 8:00a-8:30a - An Appointment has been Schedule...	05/04/2016 09:14 PM
White, Emily	[Appointment Notification] General Advising @ Apr 28 2016 4:30p-5:30p - Appointment ScheduledAn appointm...	04/28/2016 11:36 AM
White, Emily	[Appointment Reminder] General Appointment @ 04/28/2016 8:00a-8:30a - Appointment Reminder This is to r...	04/28/2016 07:56 AM
Person, Unknown	[Appointment Notification] General Appointment @ Apr 28 2016 8:00a-8:30a - An Appointment has been Schedule...	04/26/2016 10:30 PM
White, Emily	[Appointment Notification] General Advising @ Apr 28 2016 3:30p-4:30p - Appointment ScheduledAn appointm...	04/26/2016 09:14 PM
	[Appointment Reminder] General Advising @ 04/04/2016 4:00p-4:30p	04/04/2016



Key Takeaways

- Advisors and support staff can have two-way conversations with students via email or text
- The platform captures all conversations automatically for a complete digital record of all communications through the platform
- Students can receive push notifications to remind them of deadlines and priorities from their "Path" timeline



Progress Reports



Professor Home ▾

Teodor, please respond to the following progress report request(s):

- GradesFirst Support would like you complete 2 progress report(s) by **Friday, Jun. 02, 2017** [Fill Out Progress Reports](#)
- Audrey Wilson would like you complete 1 progress report(s) by **Monday, Jun. 19, 2017** [Fill Out Progress Reports](#)

Progress Reports ▸ 3 Weeks into Term Check In ▸ Edit

Step 1: Name & Message

Name your Progress Report Campaign, and provide a message for professors.

Based on your student selection(s), the application will send 9 evaluation requests for 7 students in 6 sections to 7 professors. Below is a list of all the evaluation requests that will be sent. Please review the list to ensure all desired students and courses are included.

Evaluation Requests To Be Sent

STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
1	Benito Aaby	354534289	Bryon Adams	AAA 101	Multiple profs 001
2	Benito Aaby	354534289	Teodor Wadlington	AAA 101	Multiple profs 001
3	Osma Brougher	049613683	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT 003
4	Kay Farkas	92393617	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT 003
5	Amrita Lorna	034808368	Maanlie Hamaaee	CHEM1001	CHEM 1 PROBLEM SOLVING 1
6	Amrita Lorna	034808368	Katherine Matthews	ENGL2050	INTERM EPOSITORY WRITING 2
7	Medea Moffet	074796343	Kirsten Smith	3DS-3000	INTRO TO SCULPTURE 006
8	Sakina Nimmons	555678636	Steven Kilpatrick	3DS-3000	INTRO TO SCULPTURE 003
9	Alohilani Ohanley	020531399	Ashlee Demastus	PSYC-2103	INTRO TO HUMAN DEVELOPMENT 003

You **have** selected to send a follow up thank you E-mail to professors.

Step 2: Choose Students

Choose all-students, subset of students, or classes that are to be monitored.

Step 3: Define Behavior

Define how your Progress Report will behave with thank you notes and expiration dates.

Step 4: Confirm

Confirm the students enrollments which are the target of the Progress Report campaign.

Step 5: Send & Complete

Your Progress Report Campaign has been sent to instructors.

Cancel?

Delete this unsent campaign.

[Back: Define Behavior](#) [Next: Send & Complete](#)

Key Takeaways

- Solicit feedback from faculty to understand individual student performance in each course
- Collect information on a student's likelihood of failing a class, their current or anticipated grade, absences, and the need for intervention
- Based on feedback, student support staff can intervene with students early and understand the reasons for risk, manage a Case for thorough follow-up from another office, and guide students to relevant resources



Alerts & Cases

Campus-Wide Alerts, Referrals, and Documentation for Case Management

Cases

SELECT	STUDENT	ADVISOR	DATE OPENED	OPENED BY
<input type="checkbox"/>	Hamal Hollner	Needs tutoring	02/15/2016	Kate Matthews
<input type="checkbox"/>	Maddie Estick	Needs tutoring	03/16/2016	Steven Holsback
<input type="checkbox"/>	Maddie Estick	Financial Aid	03/16/2016	Gina Silver
<input type="checkbox"/>	Deanna Daulty	Needs tutoring	03/17/2016	Sam Rittenberg
<input type="checkbox"/>	Kately Parsons	Financial Aid	03/18/2016	Gradefirst Support
<input type="checkbox"/>	Naomi Garrison	Needs tutoring	03/22/2016	Sam Rittenberg
<input type="checkbox"/>	Thera Farnor	Referral	03/23/2016	Ashley Prokava

MANAGE CASE

Hamal Hollner
Reason(s): Needs tutoring
Class: AH20003 CRT APPROACHES-ART in SOCIETY
Case Owner: Jamie Stuebli
Assigned To: Kate Arsham-Pine, Jamie Bridges, Stephen Brown, Meredith Cahill, Arush Chandro, John Eagan, Walt Edon

Case Activity

- Kate Matthews opened case. 02/15/2016 2:38PM
- Kate Matthews added comment: Hamal should take his papers to the writing center before turning them in. 2:38PM
- Jamie Stuebli assigned case to Jamie Stuebli. 09:43AM
- Jamie Stuebli assigned case to Sam Rittenberg. 09:44AM
- Jamie Stuebli assigned case to Sam Rittenberg. 09:44AM

STUDENT FEEDBACK

Your information is secure. We are not selling, renting or sharing your information without your permission. Thank you for using Gradefirst!

Professor class(es):
You have been added to fill out progress reports for students in the following class(es):

CO004238-1 System Issues & Global Media

Student Name	At-Risk to Fail Your Class?
Battis, Bryan	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Hilly, Scott	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Perry, Nathan	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Stevens, Tony	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Wagner, Parker	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

ISSUE AN ALERT

Student: Caroline Romanoff

Please select the reason you believe this student needs assistance

- Financial Aid
- Needs tutoring
- Referral
- Positive Alert

Is this alert associated with a specific class?

Additional Comments

Please enter a comment.

Submit Cancel

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

Submit unmarked students as not at risk (I'm all done)

This button will submit students you have marked into Gradefirst 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.

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 nine of them are at risk, you don't have to mark them all. You can mark the ten 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.

Key Takeaways

- Faculty, tutors, and other support specialists can submit one-click alerts on struggling students to notify advisors that they might be at risk
- Advisors can also solicit information directly from faculty through Progress Report campaigns sent directly to faculty email
- Case system allows users to generate cross-campus referrals for at-risk students right from the platform and assign them to appropriate support staff
- Advisors can see a complete digital history for each student—including advising reports, notes, and cases—thereby closing the loop for maximum effectiveness

Student Initiated Appointment Scheduling

Online Appointment Scheduling and Availability Management

Advisor Home

Students | Upcoming Appointments | My Availability | Advising Center | Advising Requests

Edit Appointment Constraints

Times Available

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT	
<input type="radio"/>	Thu	12:30p-2:00p	(do not use) Summer Semester	Academic Success Center	Change Major/Minor, Degree Planning, General Advising	Inactive/Full
<input type="radio"/>	Wed					
<input type="radio"/>	Tue, Wed					
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri					

Choose A Time To Meet

Length: 15 min*

Available: Show Availabilities for This Course/Plan...

TIME SLOT	06/05 (SUN)	06/06 (MON)	06/07 (TUE)	06/08 (WED)	06/09 (THU)	06/10 (FRI)	06/11 (SAT)
11:10-12:30p							
12:30p-12:30p							
12:30p-12:40p							
12:40p-12:50p							
12:50p-1:00p							
1:00p-1:10p							
1:10p-1:20p							
1:20p-1:30p							
1:30p-1:40p							
1:40p-1:50p							
1:50p-2:00p							

Reminders

Send an email reminder?

Your administrator has enabled automatic text reminders.

Schedule Tutoring

Select a time

FRIDAY, OCT 16

8a 8:30a 9a 10a

10:30a 11a 11:30a 12p

12:30p 1p 1:30p 2p

2:30p 3p 3:30p 4p

4:30p 5p 5:30p 6p

confirm appointment

Key Takeaways

- Appointment management allows advisors and students to schedule sessions based on both parties' availability, with the option to send reminders for upcoming appointments
- Real-time scheduling by various user types enables easy access to advisor and tutor services
- Students can access appointment scheduling from their desktops and smartphones

