SSC NAVIGATE GUIDE FOR FACULTY AND STAFF

SOUTHERN CONNECTICUT STATE UNIVERSITY

An SSC Navigate resource for the Southern Community

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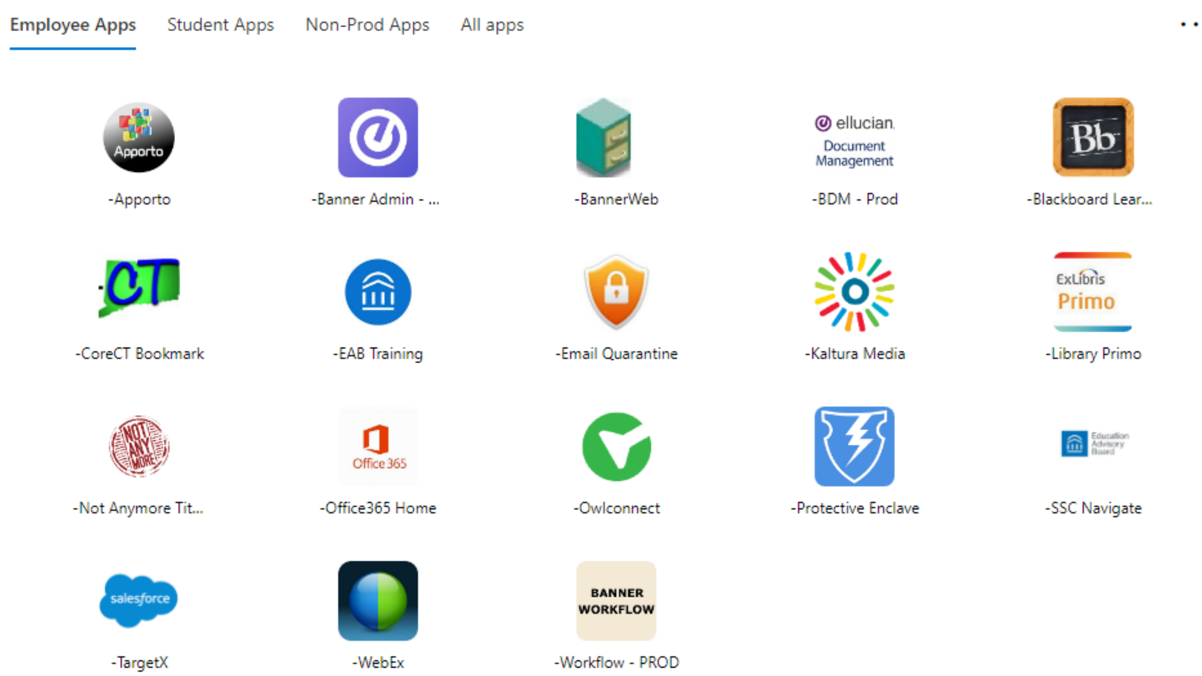
Accessing SSC Navigate

To access SSC Navigate, simply login to your account at [***login.southernct.edu***](login.southernct.edu) to open the Access Panel Applications. From here. SSC Navigate is one of the apps.

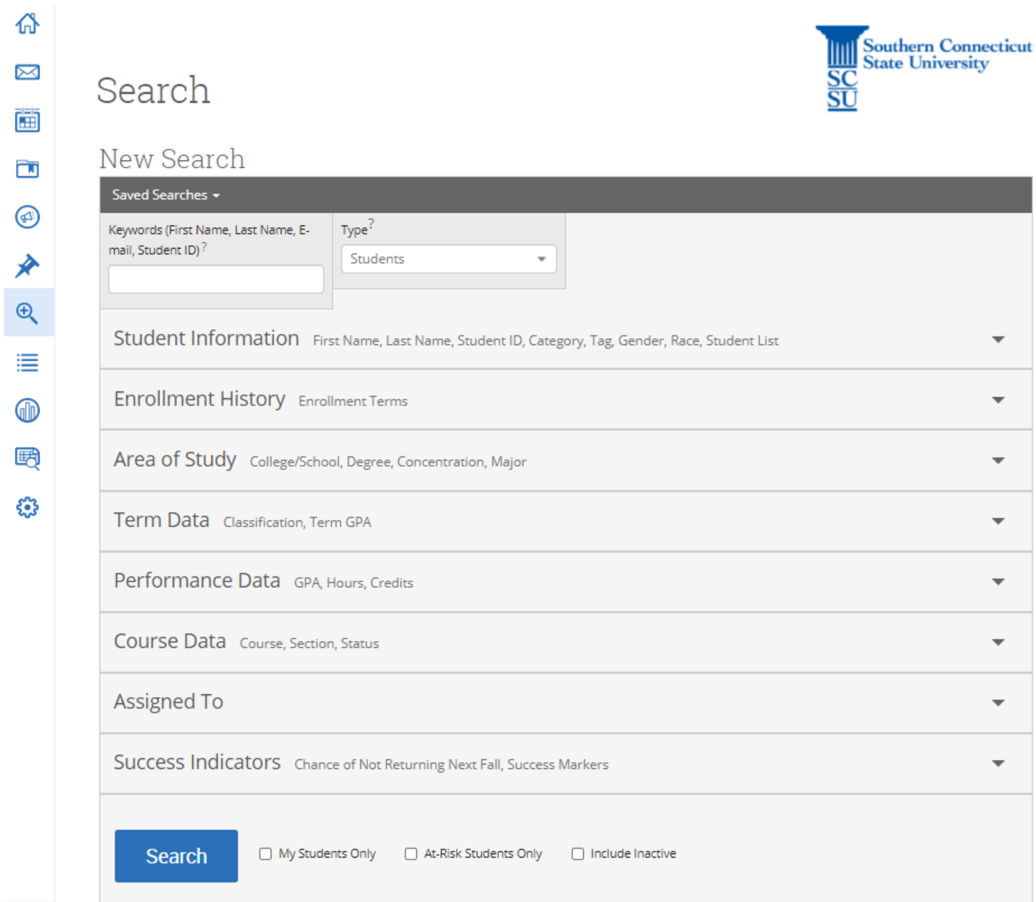
NOTE: *SSC Navigate is not compatible with all browsers. You should default to using Google Chrome when accessing SSC Navigate.*



Student Lists & Advanced Search

Advanced Search

The Advanced Search function with Navigate allows you to search for a cohort of students based on various search parameters, as shown below. You can find the Advanced Search tab by clicking the magnifying glass icon from the left side tool bar.



How does Advanced Search Work?

To create an advanced search, you just select the search parameters that you are interested in and click the "Search" button below. Some of these may be fields in which a drop-down menu is available to choose from, such as Area of Study, or you may need to enter free text. You also have the option to select one or more of the following:

- **My Students Only** will limit the possible results to only your assigned students.
- **At-Risk Students Only** will limit the possible results to only students that have been flagged as at-risk via a progress report.
- **Include Inactive** will expand the possible results to both active and inactive students. By default, the search results only display users who are active in the currently selected term.

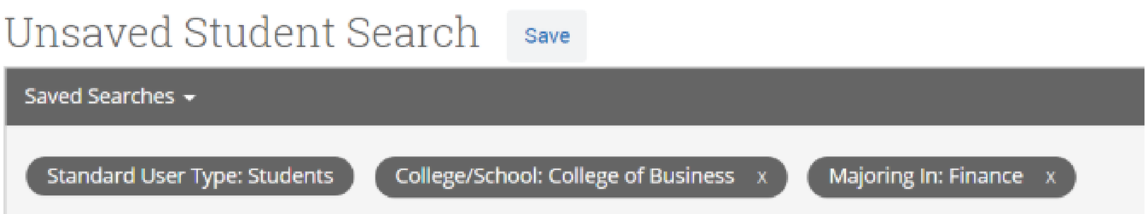
Note: If you are searching for Graduate students only, you can filter this by selecting "Graduate" under the 'Term Data' and then 'Classification (In Any of These)' bucket of Advanced Search. Or, if you want to exclude Graduate students, you can do so by adding 'Graduate' under the 'Classification (in none of these)' bucket.

Note: Minors can be searched via the 'Categories' option under the 'Student Information' bucket in Advanced Search.

Saving a Search

After creating an Advanced Search, you have the option to save the search. Saved Search allows users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike Student 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.

You can create a saved search via the **Advanced Search** feature. After selecting your search parameters and running the search, click on the 'Save' button at the top of the screen.



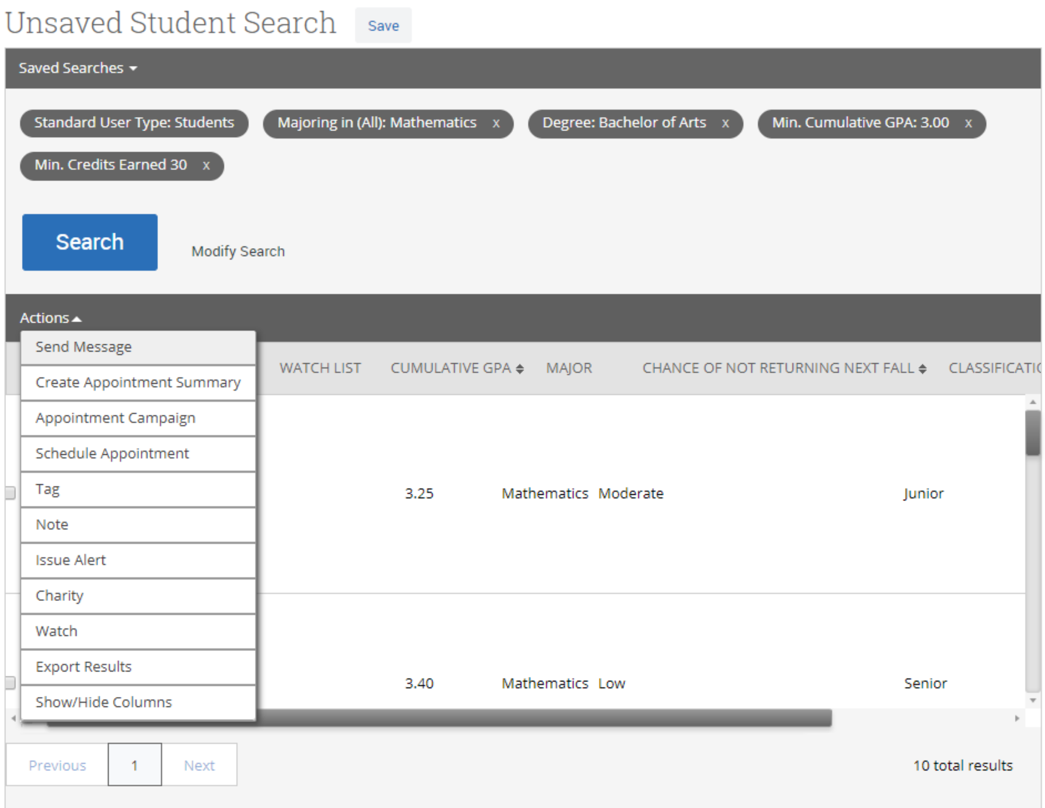
After selecting 'Save', you must name your search. Always make the name as specific as possible. For example, if you create an advanced search of all mathematics majors, make sure to save it as something like "FA 2019 Math Majors" as opposed to just "Math Majors". Then, select 'Save Search' and you are done.

To view your saved search, select the 'Lists & Searches' option from the left side toolbar.

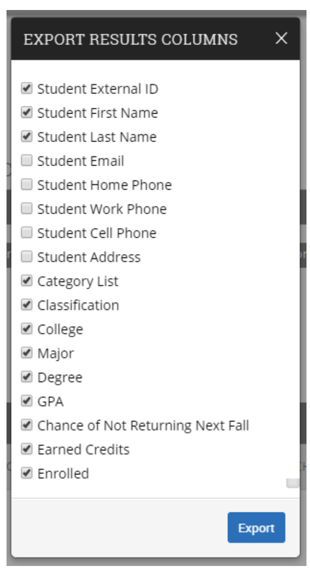
Creating a Report from an Advanced Search

Once you have entered you search parameters in Advanced Search and have selected Search, you have the option to export your results into an excel document.

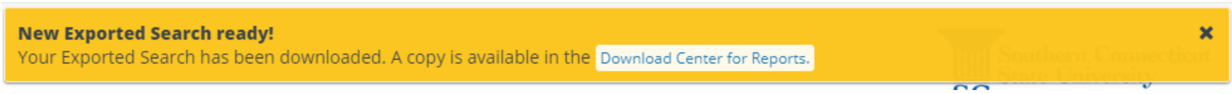
The example below is an advanced search of Mathematics Majors with a 3.0 cumulative GPA, going for Degree: Bachelor of Arts and minimum credits earned of 30. To have this search exported as an excel document, simply select the 'ALL' option below the Actions menu, and then from the action menu select 'Export Results'.



From here, the ‘Export Results Columns’ menu will appear. This is where you can choose what information you wish to be included in the exported document. If you, for example, don’t need to see the student’s home phone or address in this report, simply uncheck the box next to that item. Once you have the correct criteria selected, click ‘Export’.



Once the report has been created, you will see a yellow bar at the top of your screen that says, 'New Exported Search ready!'. Select the 'Download Center for Reports' link to access the tab with the document.



In the Download Center for Reports, select the most recent search to download a copy of the excel document onto your computer.

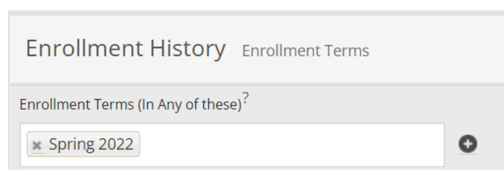
Useful Advanced Searches

Advanced Search for Students by Major

Use this approach to an Advanced Search to find all students who are currently in any major(s) for a given term. You can also narrow this down by concentration as well.

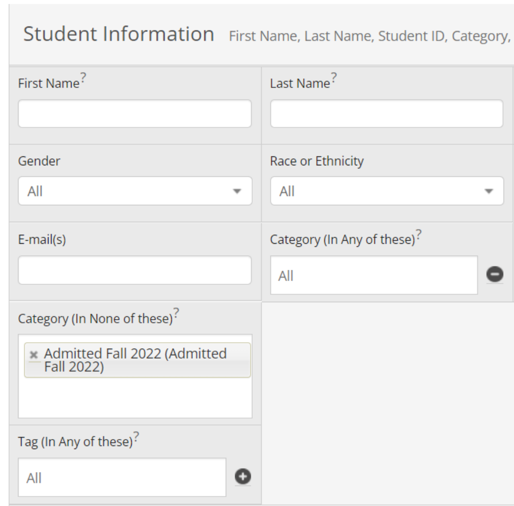
Step 1: Navigate to the Advanced Search page by using the magnifying glass icon in the left-hand side toolbar.

Step 2: Select the "Enrollment History" bucket and under "Enrollment Terms (In Any of These)" enter the term you are interested in finding students for. We will use "Spring 2022".

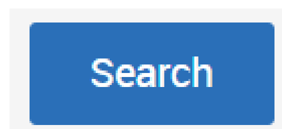


Note: This searches for students enrolled in the current term. You always want to include an enrollment term, otherwise you may get students in your list who are not currently, or no longer at SCSU.

Step 3: Select the "Student Information" bucket and then the '+' next to "Categories". That will open the "Categories (In None of These)" option. In the "Categories (In None of These)" spot, enter "Admitted [Term]" for the next upcoming term (specifically Fall or Spring). In our case, we were searching for Spring 2022 students, so we'll enter "Admitted Fall 2022". This will exclude current Early College students, who will be in your major in the coming term, but are not yet.



Step 4: Search!

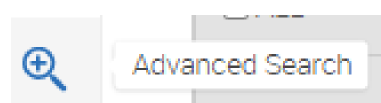


Advanced Search for Graduated Students

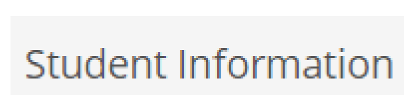
Use this approach to an Advanced Search to find all students who are going to graduate in a future semester. You can narrow this search down to be all graduating within a school, major, etc.

If you are doing this search to find students who have already been awarded their degrees for a given semester, use the following steps.

Step 1: Navigate to the Advanced Search page by using the magnifying glass icon in the left-hand side toolbar.



Step 2: Select the "Student Information" bucket to open it up and enter "UG Degree Status: Awarded [Term]" to find undergraduate students or "GR Degree Status: Awarded [Term]" to find Graduate



students within the “Categories (In Any of These)” area to find students who graduated [Term].

If you are unsure of the semester (term) code to enter, use the following:

Enter the academic year followed by the semester code -

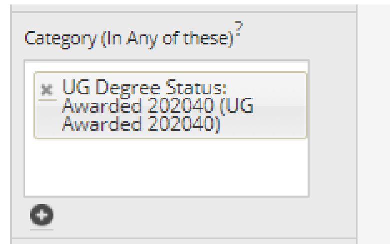
Spring – 40

Summer – 50

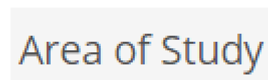
Fall – 10

Winter – 20

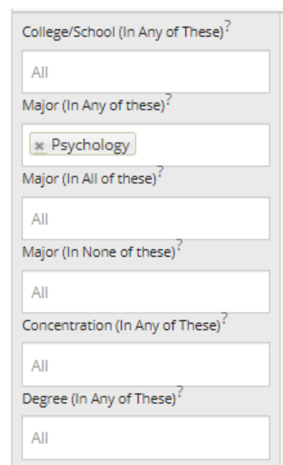
(Our example is UG students awarded their degree in Spring 2020)



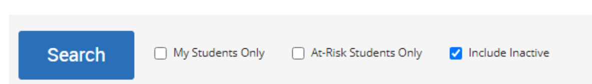
Step 3: Select the “Area of Study” bucket to open it. Here is where you can specify a college/school, major, etc. Enter the desired school/major(s) you are interested in.



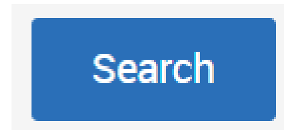
For this example, we will search for all Psychology majors. Note that in step 2 we chose UG Degree Status: Awarded 202040, so we are already looking at UG degrees awarded. Therefore, in our example, we will get UG Psychology students who were awarded their degrees for Spring 2020.



Step 4: Select the “Include Inactive” button found to the right of the “Search” button. Once a student graduates, they are marked as inactive and therefore will not appear in the search unless this option is checked.

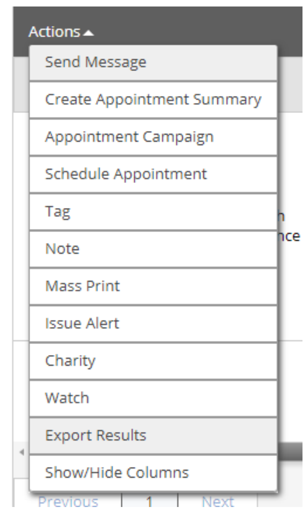


Step 5: Click “Search”

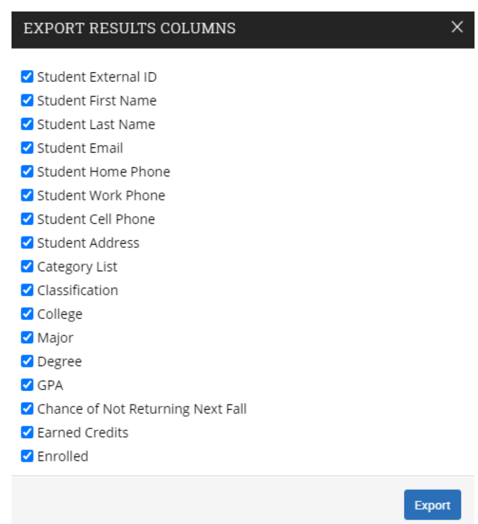


The result will be a list (as well as a total) of students that satisfy the criteria you entered.

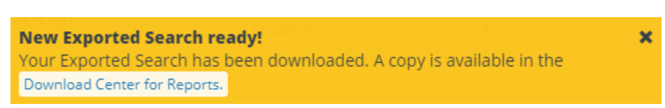
Step 6: Select “Actions” and then “Export Results” to export this list of students to a .csv file that you can open in Excel.



Before exporting, you can select the columns of information that you would like to include/not include in the export, and then select “Export”



Once the file has been exported, a yellow bar will appear at the top of the screen saying “New Exported Search ready!”. Select the “Download Center for Report” button to navigate to the file if it does not automatically download. Your file will be the most recent (top



of the list). Select it to download the file.

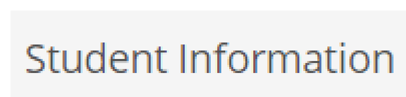
Advanced Search for Graduating Students

Use this approach to an Advanced Search to find all graduating students in a given semester. You can narrow this search down to be all graduating within a school, major, etc.

If you are doing this search to find students who will be graduating, but have not yet been awarded their degrees, you will use the following steps.

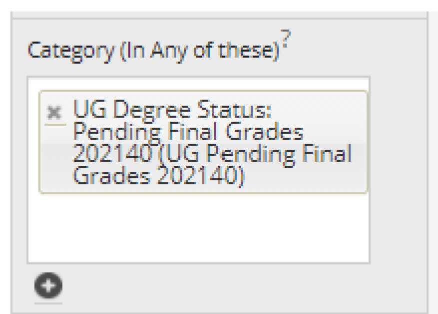
Step 1: Navigate to the Advanced Search page by using the magnifying glass icon in the left-hand side toolbar.

Step 2: Select the "Student Information" bucket to open it up and use the "Categories (In Any of These" area.



You have the following two options to find students who will be graduating:

"UG Degree Status: In Review for Graduation [Term]" OR UG "Degree Status: Pending Final Grades [Term]" (the same applies for GR Degree Status).



A student is marked as "In Review for Graduation" when they have completed **75%** of their program requirements.

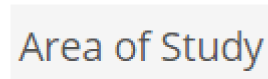
A student is marked as "Pending Final Grades" when they have completed **98%** of their program requirements, meaning the student's final requirements are in progress.

If you are unsure of the semester, [Term] code to enter, use the following:

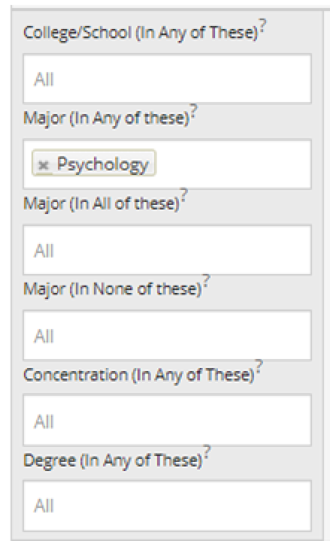
Enter the academic year followed by the semester code:

Spring – 40
Summer – 50
Fall – 10
Winter – 20

Step 3: Select the “Area of Study” bucket to open it. Here is where you can specify a college/school, major, etc. Enter the desired school/major(s) you are interested in.

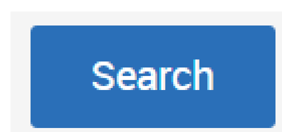


For this example, we will search for all Psychology majors. Note that in step 2 we chose UG Degree Status: Pending Final Grades 202140, so we are already looking at UG degrees. Therefore, in our example, we will get UG Psychology students who are enrolled in their final program requirements for Spring 2021.

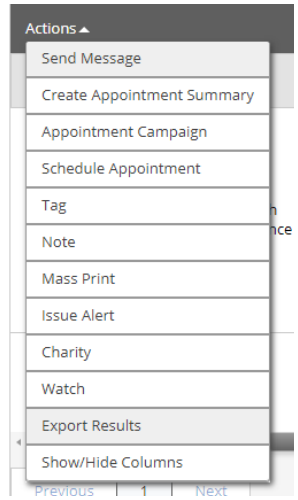


Step 5: Click “Search”

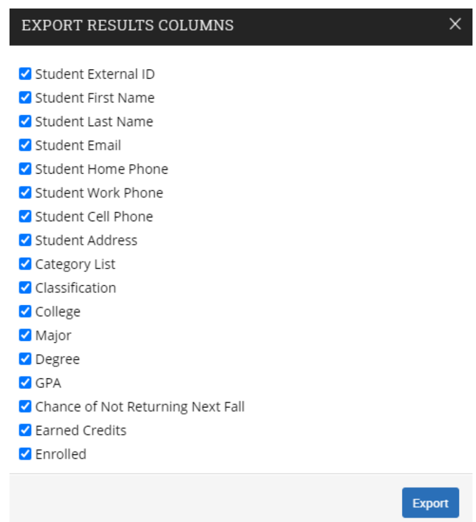
The result will be a list (as well as a total) of students that satisfy the criteria you entered.



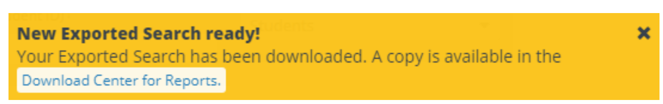
Step 6: Select “Actions” and then “Export Results” to export this list of students to a .csv file that you can open in Excel.



Before exporting, you can select the columns of information that you would like to include/not include in the export, and then select “Export”



Once the file has been exported, a yellow bar will appear at the top of the screen saying “New Exported Search ready!”. Select the “Download Center for Report” button to navigate to the file if it does not automatically download. Your file will be the most recent (top of the list). Select it to download the file.



Advanced Search for Current Students Unregistered for Coming Term

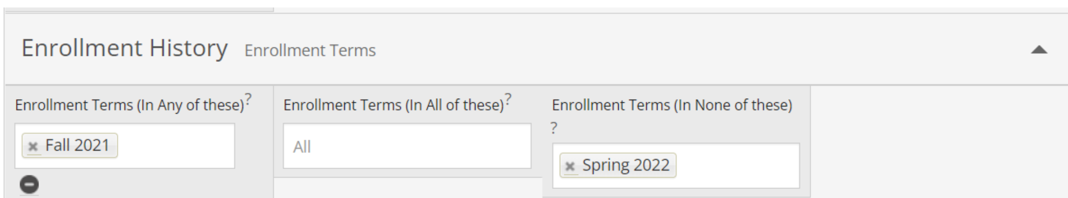
You can use Navigate to find any currently enrolled students who are not yet registered for the coming semester. This search will exclude students who will be graduating, students that will be on a leave of absence and will return just those students who should be registered for the coming semester but are not yet.

Step 1: To start, you have two options, you can either run this search through the Advanced Search, which will just return the list of students, or through the Student Info report which will then include advisor assignments. The Student Info report can be found on the “Reporting” page.

Once in the Advanced Search or Student Info report, you enter the same search parameters outlined below.

Step 2: Under the “Enrollment History” bucket, select the small “+” icon, this will expand your selections.

Then, in “Enrollment Terms (In Any of These)” enter the current term, for our example “Fall 2021”. Then, under “Enrollment Terms (In None of These)” enter the upcoming term, for our example “Spring 2022”. This will filter to look for students currently enrolled, who are not yet enrolled in the upcoming semester.



Step 3: In “Student Information” bucket, in “Category (In Any of These)” area, select the small “+” icon. This will open up the “Category (In None of These)” option, where you can exclude certain groups of students.

Then, in “Category (In None of These)” enter the “Degree Status: Pending Final Grades [academic year][semester code]” for students graduating in the current term and “Degree Status: In Review for Graduation [academic year][semester code]” for students graduating during the winter or summer term. You will need to enter for UG and GR if you are pulling both lists. See screen shot below for example search parameters. See description of semester codes below.

- Understanding the semester codes: The first four numbers are the end date of that academic year, then the last two numbers correspond to the semester code, listed below. So, all the semesters within the 2021-2022 academic year are listed as 2022; they year when all student would in the graduation ceremony in 2022.

-

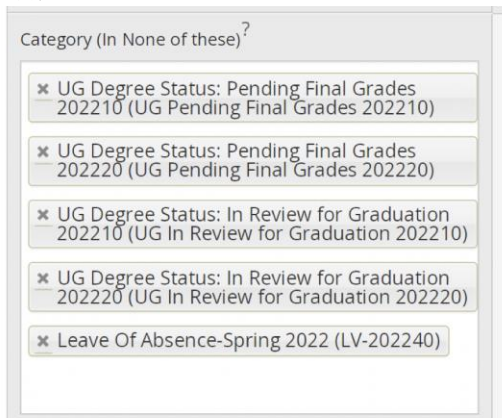
Semester codes are as follows:
Fall – 10
Winter – 20
Spring – 40
Summer – 50

Example: The [academic year][semester code] you should enter following the degree status is as follows:

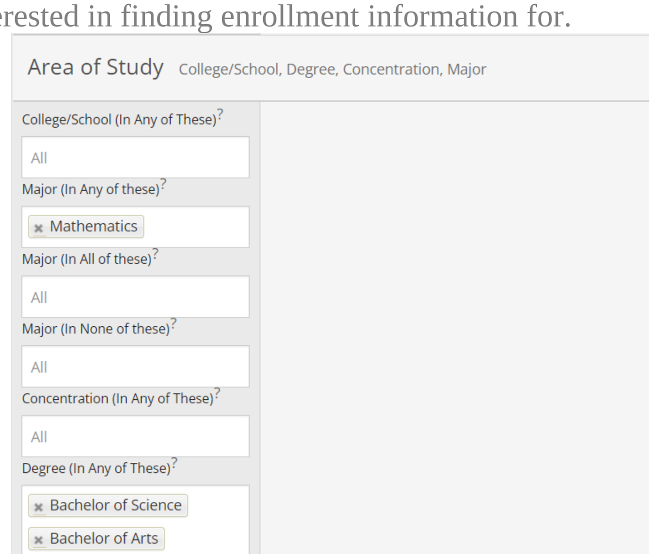
Fall – Next Year +10 (Fall 21 = 202210)
Winter – Year + 20 (Winter 21-22 = 202220)
Spring – Year + 40 (Spring 22 = 202240)
Summer – Year + 50 (Summer 22 = 202250)

Step 4: In "Student Information" bucket, in the same "Category (In None of These)" area enter "Leave of Absence-Spring 2022" (or the upcoming semester you are interested in).

Steps 3-4 sample screen-shot:



Step 5: In the "Area of Study" bucket, enter the major(s) and degree(s) of the students you are interested in finding enrollment information for.



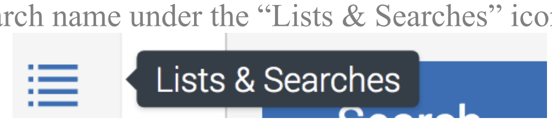
Step 6: Select "Search" and you will obtain a list of students currently enrolled, who have not enrolled in the upcoming term that are not graduating and will not be on a

leave of absence. Click on the Actions carrot to select the “Export Results” option.

Step 7: If you used the Advanced Search option, you could save this search and run it regularly.

Click on “Save” to name it.

To re-run, look for the search name under the “Lists & Searches” icon.



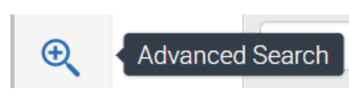
Note: If a student has a registration hold, this will be listed in the results under “Categories” as “Registration Hold (Registration Hold)”.

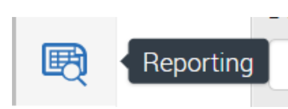
If you would like to search for the students who have registration holds, simply add “Registration Hold (Registration Hold)” in your search under “Student Information” → “Categories (In Any of These)”.

Advanced Search for New Incoming Transfer Students

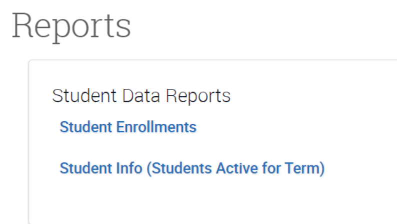
You can use the Advanced Search feature of Navigate to find a list of new incoming transfer students for any major or set of majors. See instructions below on how to find this list.

Step 1: To start, you have two options, you can either run this search through the Advanced Search, which will just return the list of students, or through the Student Info report which will then include advisor assignments and demographic information. The Student Info report can be found on the “Reporting” page.

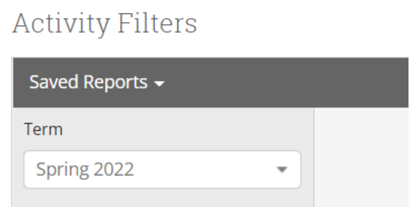




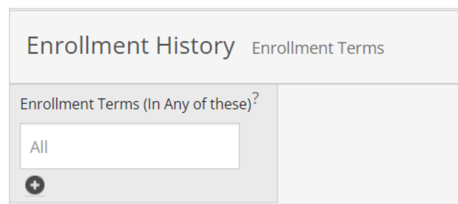
Once in the Advanced Search or Student Info report, you enter the same search parameters outlined below.



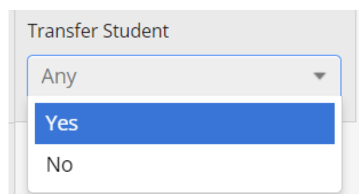
Step 2: If you chose the Student Info report, select the term you are interested in as the "Activity Filter" term.



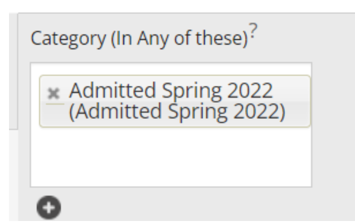
If you chose the Advanced Search, in the "Enrollment History" bucket, under "Enrollment Term (In Any of These)" enter the term you are interested in. For our example we will be using "Spring 2022".



Step 3: Under the "Student Information" bucket, select Transfer Student → "Yes" to see only transfer students.

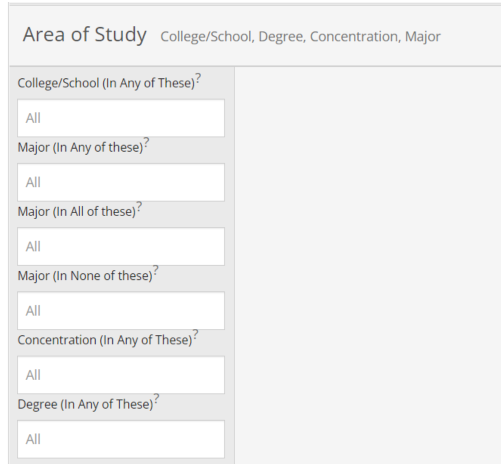


Step 4: Under the "Student Information" bucket, then "Categories (In Any of These)" enter "Admitted [Term]" for the term you are interested in.



Step 5: Under the "Area of Study" bucket, add the major(s) and degree(s) you are looking for.

If you only want to see undergraduate students, adding the undergraduate degrees here will ensure you do not return any graduate students in your search.



Step 6: Search!

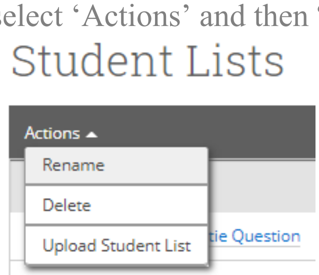
Step 7: Export your results to Excel by selecting "Actions" and "Export Results".

What is a Student List?

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

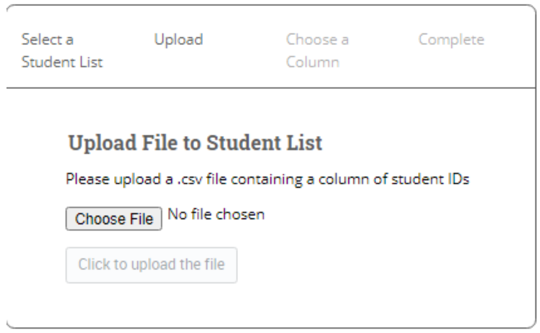
Uploading a Student List

One way that you can add students to a student list is by uploading an existing file that you have which contains ONLY student ID's. First, what you need to do is save that file as a .csv (Comma Delimited). Once saved, navigate to your 'Lists and Searches' page by selecting this icon from the left-hand side toolbar: . Next, under 'Student Lists' select 'Actions' and then "Upload Student List'.



Now, you will be prompted to choose the student list that you would like to upload to, you can either select an existing one, or choose to create a new one.

After this, you will be asked to upload the .csv file containing a column of student ID's. Make sure your file is saved as .csv, and then use the 'Choose File' box to upload it.



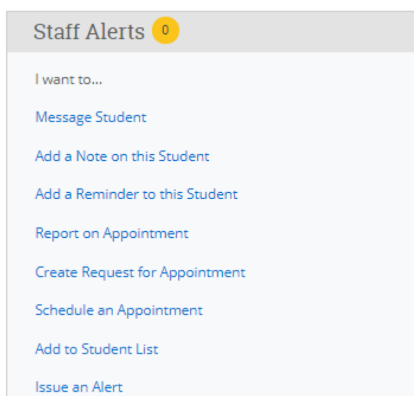
Now select 'Click to upload the file' and the students will begin uploading into the desired list.

Note: It can take up to 10 minutes before all the students in your file are added to the student list, especially for larger files.

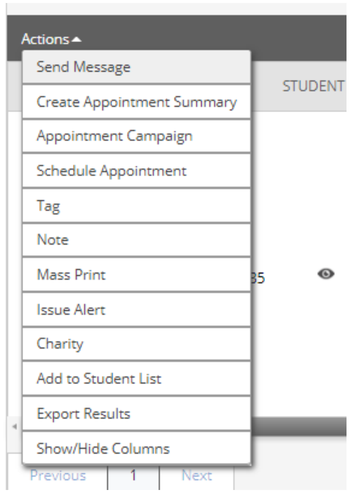
Adding Students to a Student List within Navigate

There are many other ways to add students to a Student List within Navigate. We will discuss them below.

First, you can add a student to a Student List from the student's profile page. Once on the student's profile page, there is a list of quick links below "Staff Alerts" on the right-hand side of their profile. Here you will see "Add to Student List":



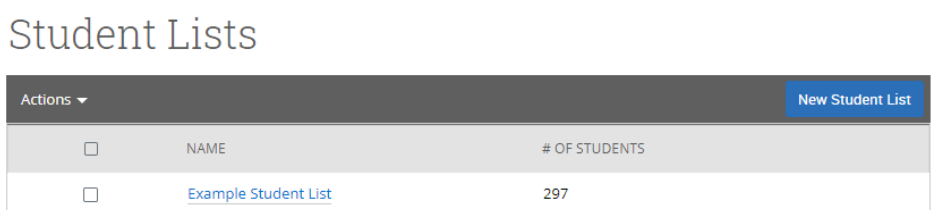
An alternate way to add a student to a Student List is through an Advanced Search. Once you complete an Advanced Search, you will see the 'Actions' menu where you can select multiple, or all students from the search to add to a student list. Select students by selecting the small checkbox next to their name, or by selecting 'All' directly below the Actions menu. Once the student you wish to add to the list are selected, hit 'Actions' and 'Add to Student List'.



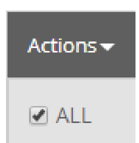
You will then be prompted to either add them to an existing list, or create a new one.

Creating a Report from a Student List

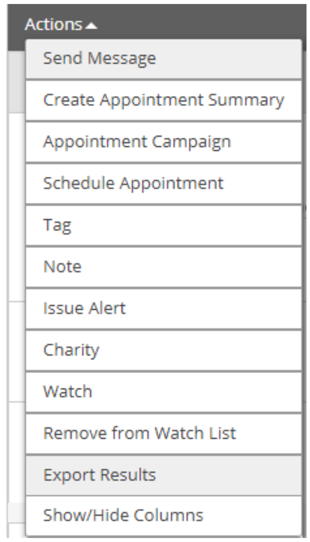
If you would like to export student's information that you have in a Student List, first navigate to the Student List you are interested in by selecting the name of the Student List.



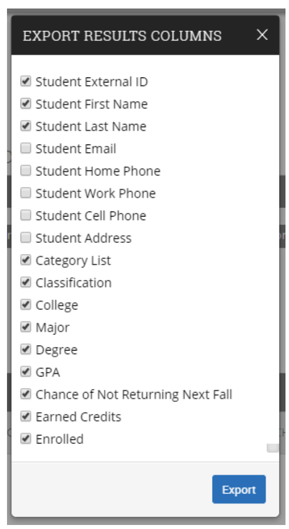
Next, select all the students in the Student List by click the box next to 'ALL' and then click the arrow next to 'Actions' to open the Actions drop-down menu.



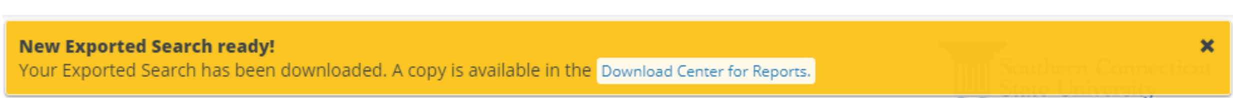
Now, select 'Export Results' from the drop-down menu.



From here, the ‘Export Results Columns’ menu will appear. This is where you can choose what information you wish to be included in the exported document. If you, for example, don’t need to see the student’s home phone or address in this report, simply uncheck the box next to that item. Once you have the correct criteria selected, click ‘Export’.



Once the report has been created, you will see a yellow bar at the top of your screen that says, ‘New Exported Search ready!’. Select the ‘Download Center for Reports’ link to access the tab with the document.



In the Download Center for Reports, select the most recent search to download a copy of the excel document onto your computer.

Communication

Navigate gives you the option to email a single student, or multiple students easily and efficiently. When using Navigate to "Send Message" (i.e. send an email) to students, it is important to remember that the email sent through Navigate will be sent to the student's SCSU Outlook email via your SCSU Outlook email. Then, when the student replies, the reply will also go to your SCSU Outlook email account. See below on how to send emails through Navigate.

Note: When sending an email through Navigate to multiple students, the email will be a BCC (blind carbon copy).

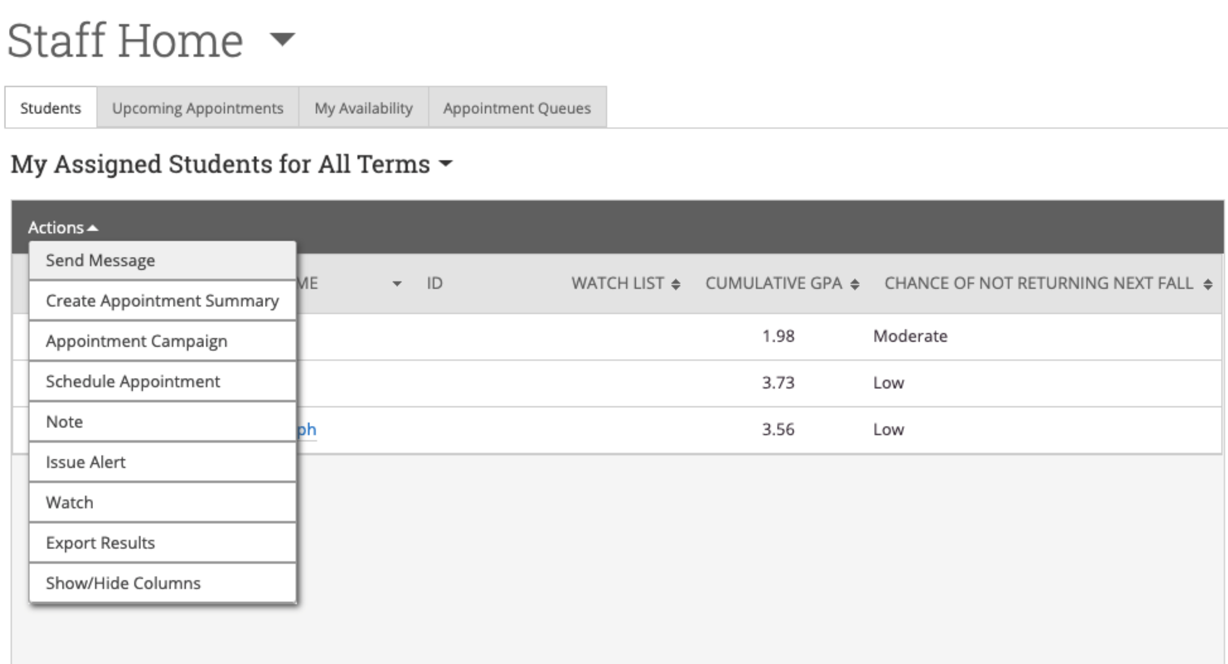
Note: If you reply to a student via the "communications" tab in Navigate, that will be recorded in Navigate. If you reply via Outlook, that will not be recorded within Navigate. All replies will be recorded within Outlook.

Emailing Advisees

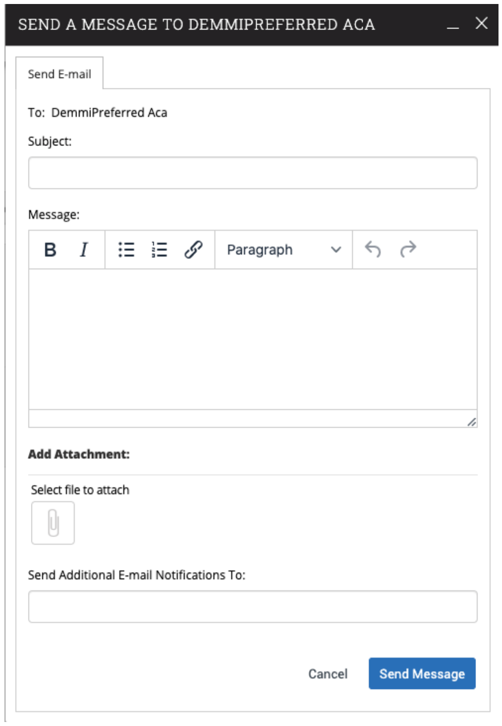
Within Navigate, you have the ability to send a quick email to all of your advisees at once. You can do this by following the below steps.

On your staff homepage, right when you sign onto Navigate, you will see "My Assigned Students for [Term]".

From this list, you can select "ALL", if you would like to email all your advisees, or check the box next to student(s) name to select specific students from the list. Once you have selected the desired students, use the "Actions" menu to "Send Message"



The following box will then appear, and you can add the subject, message and attachments as you would for a regular email.

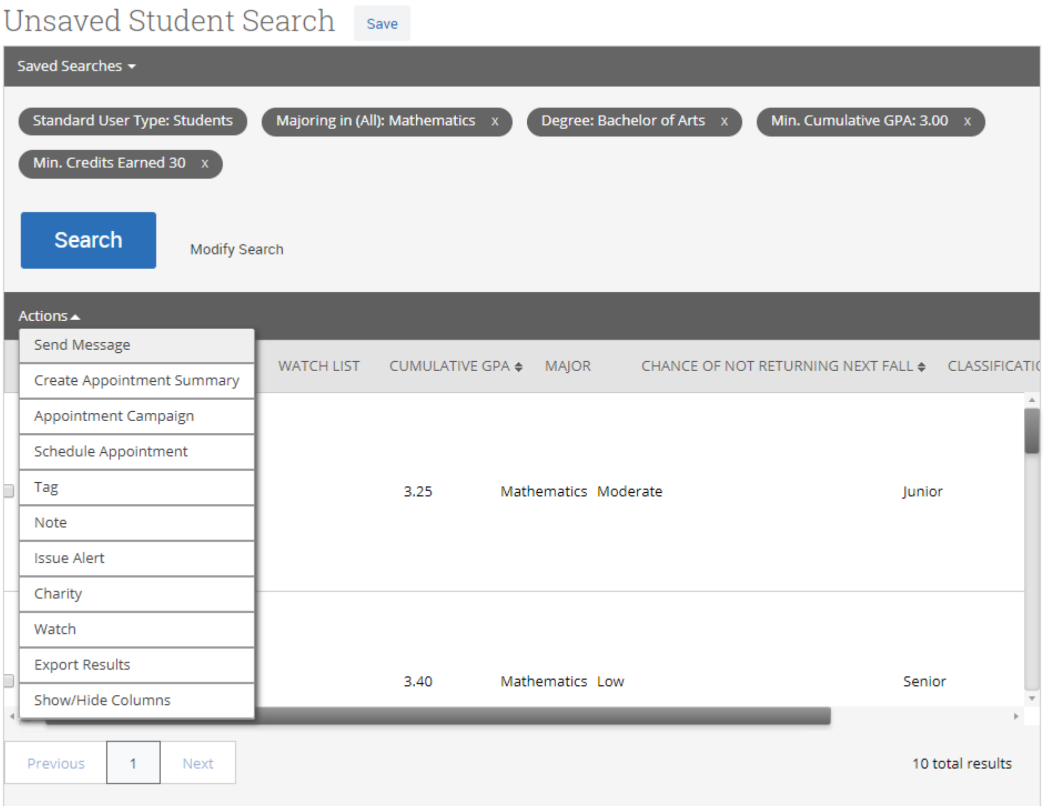


Emailing from a List

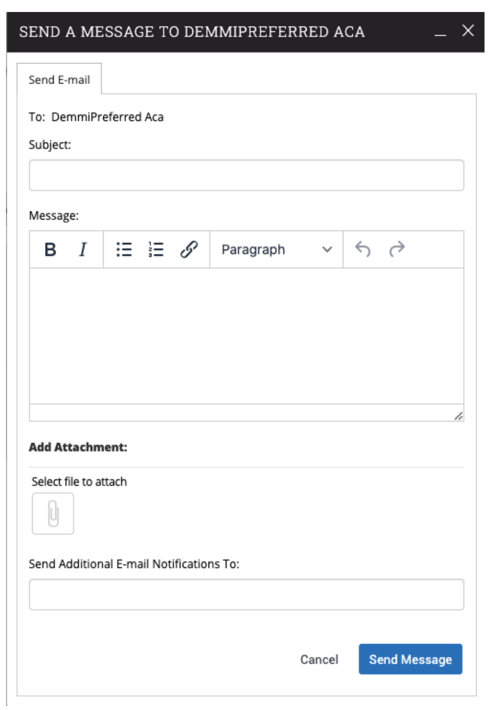
Within Navigate there are many ways to obtain a list of students, for example through an advanced search. When viewing a list of students, you always have the option to "Send Message" to that list.

While looking at the list, you can select "ALL" students in the list, or just select a few by checking the boxes next to their names.

Then, use the "Actions" menu and select "Send Message".

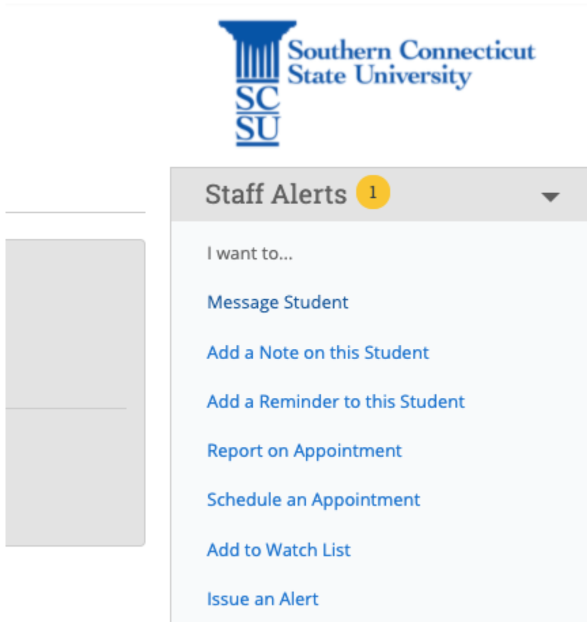


The following box will then appear, and you can add the subject, message and attachments as you would for a regular email.

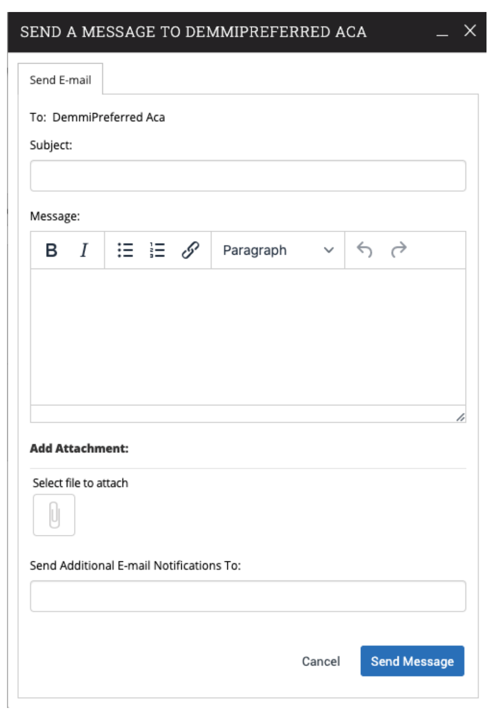


Emailing from a Student's Profile

If you would like to quickly email one student, you can do this from any student profile. Once you are on the student's profile, you should see a menu to the right-hand side that says "Staff Alerts" above it.



Here you will find "Message Student". Select this and the following box will appear where you can add the subject, message and attachments as you would for a regular email.

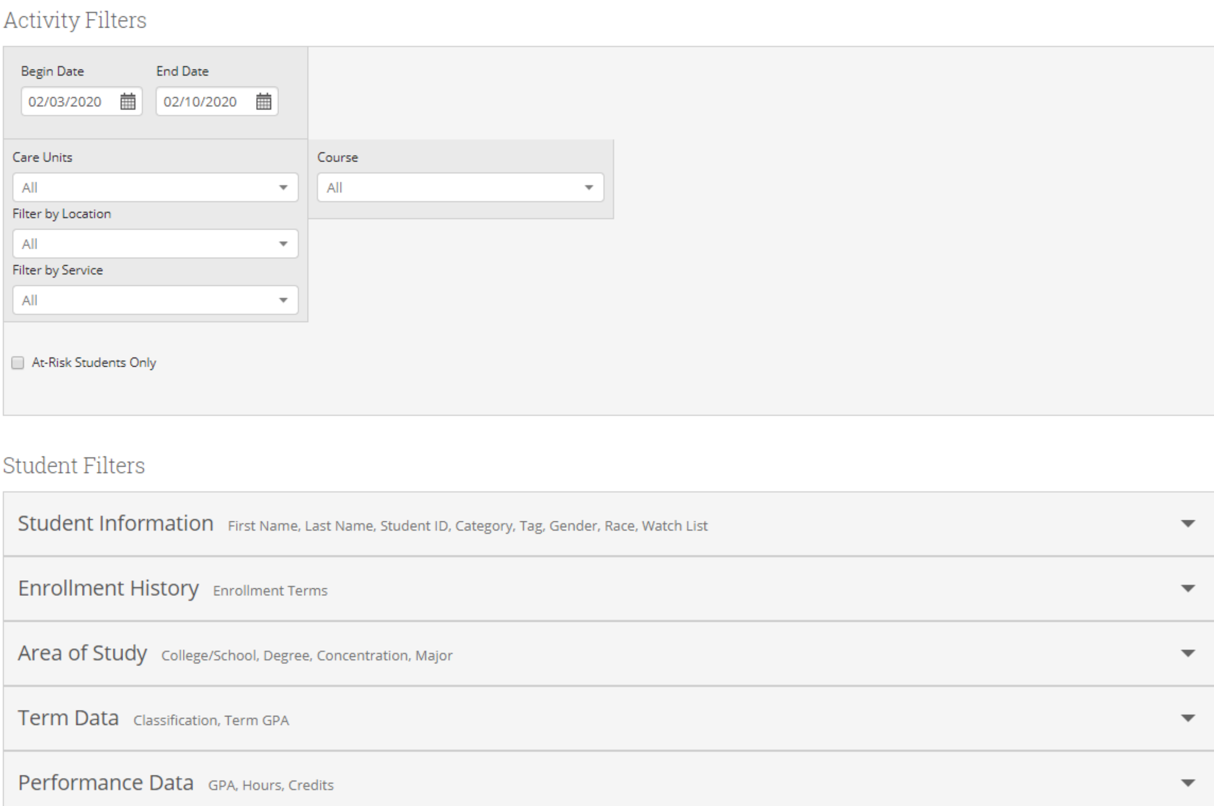


Reports

Check-ins

This report gives you information about check-ins and related data, including locations and check-out information, within the selected date range. Check-Ins capture any time a student swipes in at a kiosk.

To create a Check-ins report, simply navigate to the Reports page by selecting the icon that looks like pages of a book from the left-side toolbar. From here, under ‘Appointment/Visit Reports’ select ‘Check-ins’. You will then see the following screen:



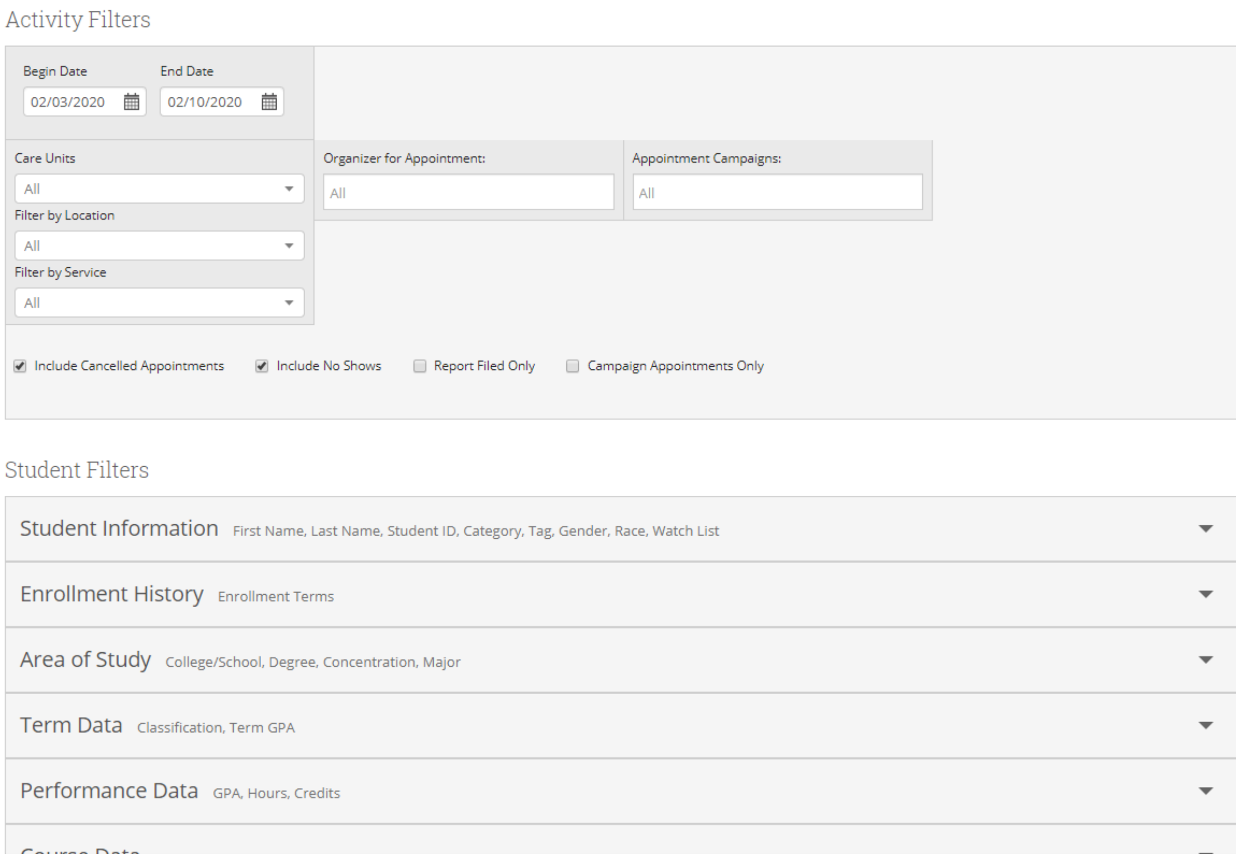
From here, you can enter your desired search criteria for Check-ins, for your care unit, in your specific location the same way you would in an advanced search.

Appointments

To create an Appointments report, simply navigate to the Reports page by selecting the icon that looks like pages of a book from the left-side toolbar.

This report gives you information about all Appointments scheduled through Navigate as well as drop-in appointments that have a summary report. It includes the location, care unit, purpose, date and organizer of the appointment among other information. You can also filter it by a specific Appointment Campaign that you may have had running.

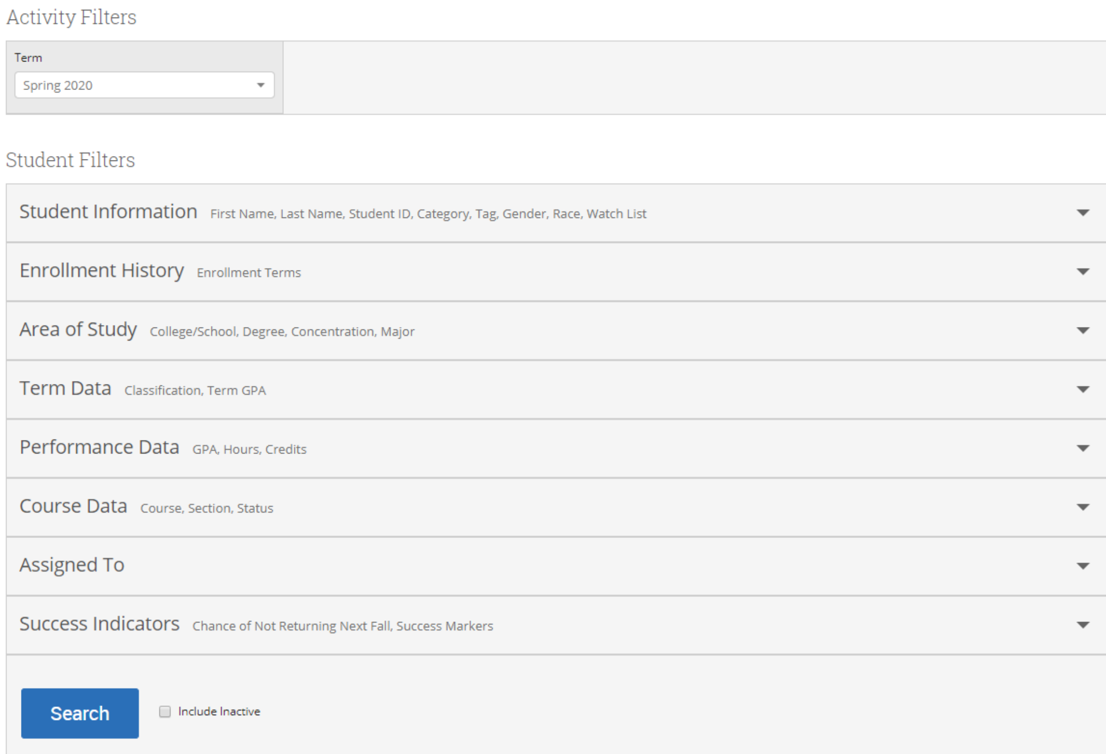
To create an appointments report, you can simply add a range of dates, as well as the Care Unit and location you are interested in. You also have the ability to filter the results by using the Advanced Search section that you see below. This allows you to look for focused groups of students that have had appointments in a certain location.



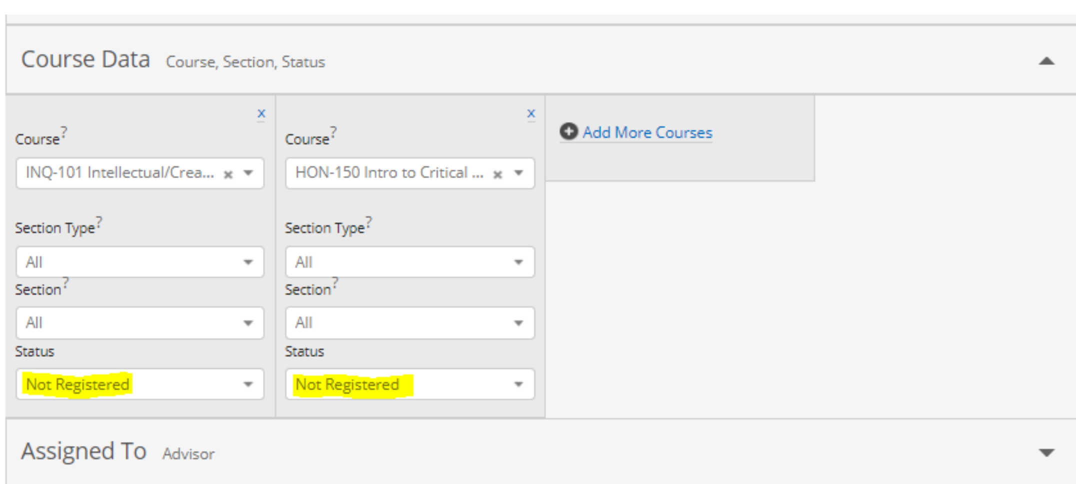
Student Info (Students Active for Term)

This report can be used to create a document which includes a list of students as well as who their assigned advisors are.

To create a Student Info report, simply navigate to the Reports page by selecting the icon that looks like a spreadsheet from the left-side toolbar. From here, under 'Student Data Reports' select 'Student Info (Students Active for Term)'. You will then see the following screen:

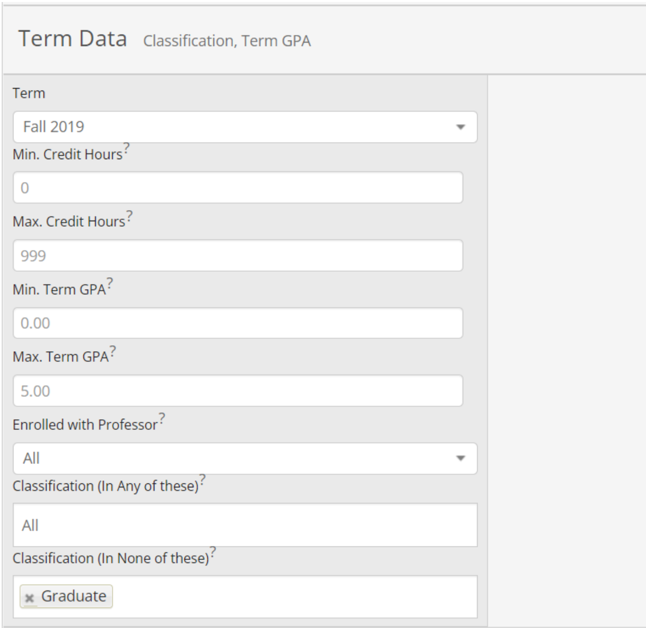


If you wish to create a report for all undergraduate students in a certain major to ensure that everyone has been assigned to an advisor, there are a few things to keep in mind. First, when checking who has been assigned an advisor, you will want to exclude all students who are enrolled in INQ 101 and HON 150 for the current term, because these students will be first year students that should not be assigned a major advisor yet. To do this fill in the following under ‘Course Data’.

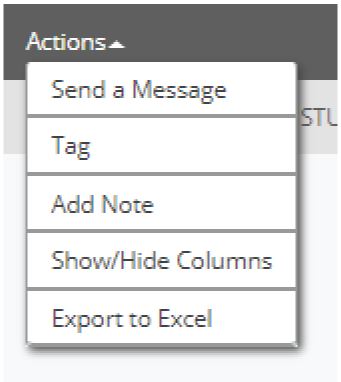


Second, you will want to exclude current Early College students who are enrolled in your major(s) for the future term. They do not need to be assigned advisors, since they are not currently in the major. To do this, go to the ‘Student Information’ bucket and click the small ‘+’ icon next to “Categories”. This will open the “Categories (In None of These)” option. In this box, enter "Admitted [Term]", where the [Term] is the upcoming semester. For example, if we are running this for Fall 2019, we would exclude students "Admitted Spring 2020".

Third, you will want to exclude Graduate students. To do so navigate to the 'Term Data' bucket and select the + sign next to classification. This will bring up an option that says 'Classification (in none of these)'. Enter 'Graduate' here. This will exclude graduate students for the selected term from the report.



Finally, under 'Area of Study', you can search for the specific major you are running the report for. After selecting the desired major, select 'Search' and a list of all students satisfying these requirements will appear. You can then export the list to excel by using the 'Actions' menu and selecting 'Export to Excel'. Remember that this report only includes students enrolled in classes for the selected term.



You will notice that this report includes columns of information that you do not need. When you go to export the data to excel, a pop-up will appear giving you the option to select only the columns that you are interested in before exporting. “Assigned Staff” is the column that lists each student’s assigned advisor.

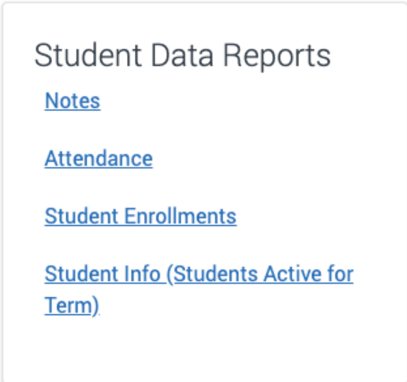
Student Enrollments

The Student Enrollments report can be used to find a list of students along with their classes, professors, midterm/final grades, etc. for a specified semester.

To create a Student Enrollments report in order to find a list of students with the above information, follow the steps below.

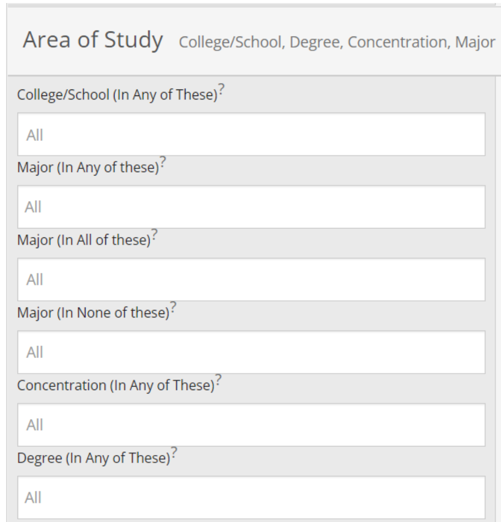
First, in Navigate open the reports page using the left-hand side toolbar.

Next, select the "Student Enrollments" report under the "Student Data Reports" section.

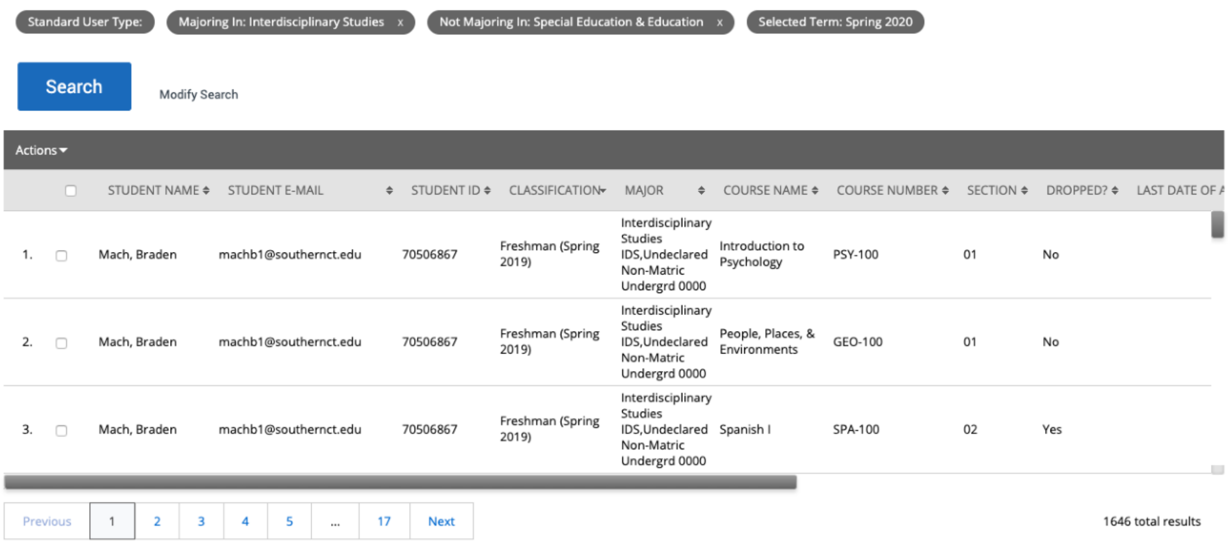


Once in the report, you can select your desired semester and then enter the search parameters just as you would in an Advanced Search. If you are unsure how to do this, please visit the “Advanced Search” portion of this document.

To specify a major and degree, just open the “Area of Study” bucket and add the major and degree that you are interested in:



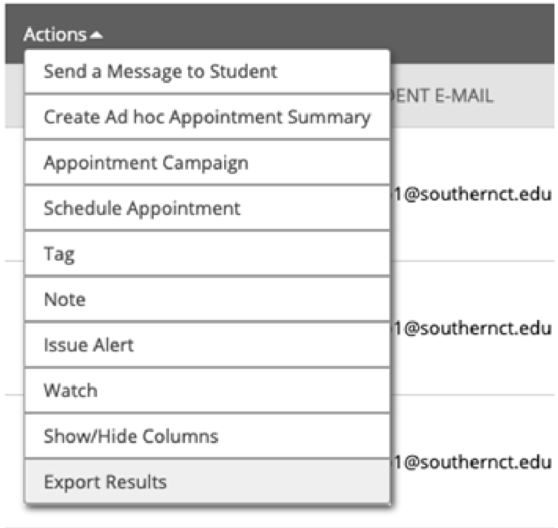
Then select "Search" and you will see something like this:



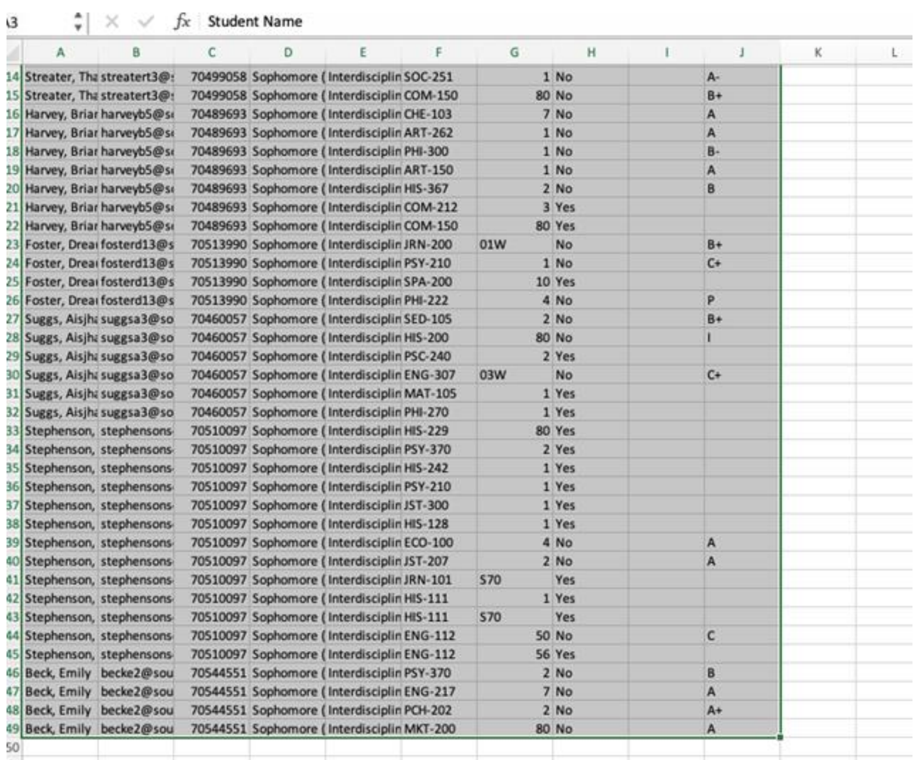
__**Note:**__ This report will list each student the number of times that they are in classes. Meaning if a student was enrolled in 4 classes, their name would appear 4 times.

Use the below to sort the data if you are interested in seeing a specific midterm/final grade. For example, we will filter the data to see only classes in which the students in our list received a Final Grade of “F” or “I”.

Select "Actions" and then "Export Results". Use the Download Center for Reports popup to download the document and then open it in Excel on your computer.



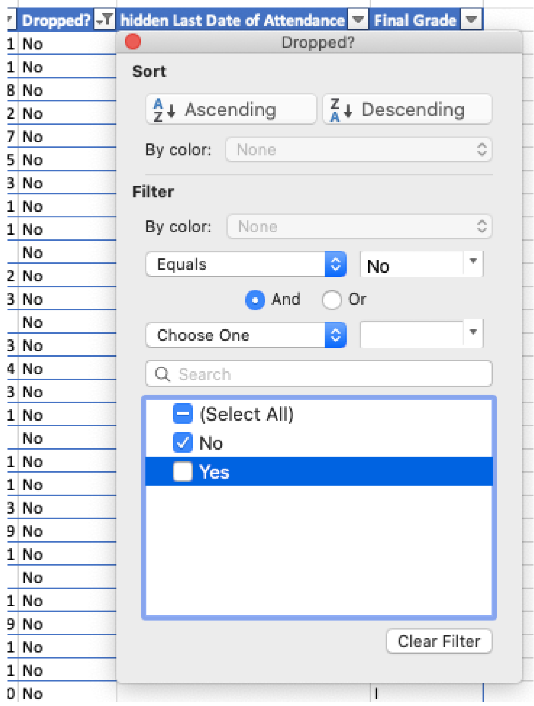
Once in Excel, you can use "Save As" to save the file as an excel workbook instead of a .csv. First thing we are going to do with the data is format it as a table. To do this, highlight the column names and then use the keyboard shortcut control + shift + down arrow (command + shift + down arrow on mac), to highlight all the data down to the last entry.



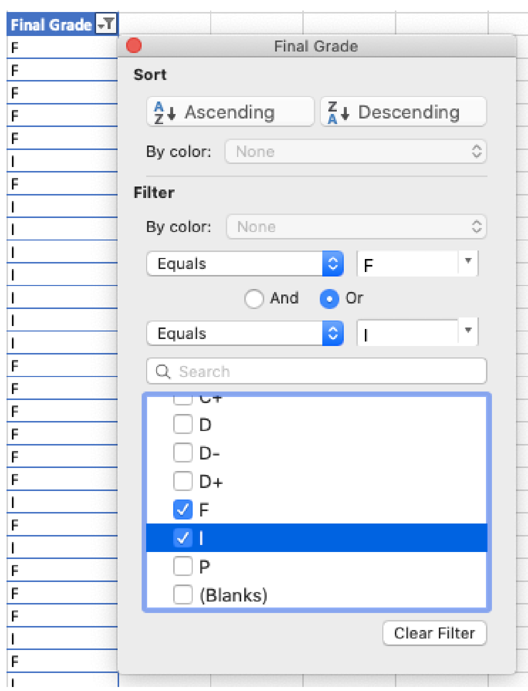
	A	B	C	D	E	F	G	H	I	J
14	Streater, Tha	streatert3@:	70499058	Sophomore (	Interdisciplin	SOC-251	1	No		A-
15	Streater, Tha	streatert3@:	70499058	Sophomore (	Interdisciplin	COM-150	80	No		B+
16	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	CHE-103	7	No		A
17	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	ART-262	1	No		A
18	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	PHI-300	1	No		B-
19	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	ART-150	1	No		A
20	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	HIS-367	2	No		B
21	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	COM-212	3	Yes		
22	Harvey, Briar	harveyb5@s	70489693	Sophomore (	Interdisciplin	COM-150	80	Yes		
23	Foster, Drea	fosterd13@s	70513990	Sophomore (	Interdisciplin	JRN-200	01W	No		B+
24	Foster, Drea	fosterd13@s	70513990	Sophomore (	Interdisciplin	PSY-210	1	No		C+
25	Foster, Drea	fosterd13@s	70513990	Sophomore (	Interdisciplin	SPA-200	10	Yes		
26	Foster, Drea	fosterd13@s	70513990	Sophomore (	Interdisciplin	PHI-222	4	No		P
27	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	SED-105	2	No		B+
28	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	HIS-200	80	No		I
29	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	PSC-240	2	Yes		
30	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	ENG-307	03W	No		C+
31	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	MAT-105	1	Yes		
32	Suggs, Aisjha	suggsa3@so	70460057	Sophomore (	Interdisciplin	PHI-270	1	Yes		
33	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	HIS-229	80	Yes		
34	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	PSY-370	2	Yes		
35	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	HIS-242	1	Yes		
36	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	PSY-210	1	Yes		
37	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	JST-300	1	Yes		
38	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	HIS-128	1	Yes		
39	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	ECO-100	4	No		A
40	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	JST-207	2	No		A
41	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	JRN-101	S70	Yes		
42	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	HIS-111	1	Yes		
43	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	HIS-111	S70	Yes		
44	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	ENG-112	50	No		C
45	Stephenson,	stephensons	70510097	Sophomore (	Interdisciplin	ENG-112	56	Yes		
46	Beck, Emily	becke2@sou	70544551	Sophomore (	Interdisciplin	PSY-370	2	No		B
47	Beck, Emily	becke2@sou	70544551	Sophomore (	Interdisciplin	ENG-217	7	No		A
48	Beck, Emily	becke2@sou	70544551	Sophomore (	Interdisciplin	PCH-202	2	No		A+
49	Beck, Emily	becke2@sou	70544551	Sophomore (	Interdisciplin	MKT-200	80	No		A

Once the data is all highlighted, on the home tab of excel you should see "Format as Table". Select this. Once your data is formatted as a table, navigate to the "Dropped?"

column, and select the small arrow next to the column header. Uncheck "Yes" to ensure that courses where a student did NOT drop the course are what remains.



Now, navigate to the arrow next to the column header of "Final Grade" and follow the same approach to only display courses where a student received an F or an I.



What remains will be a list of students and their courses for the semester you chose and the grades you filtered by.

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. Issuing an alert can draw attention to these students, create a virtual referral, and prompt action from another department.

Issuing an Alert

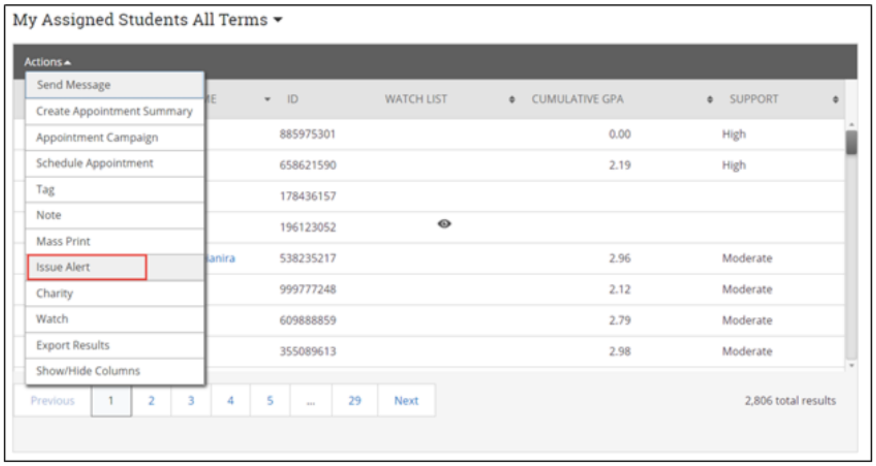
When you want to issue an alert, you have a few options on how to do so. You can either issue an alert through your homepage, an Advanced Search (or any list of students), or a student's profile.

Your Homepage

To issue an alert from your homepage, click the "Issue an Alert" button under the Actions menu on the homepage.

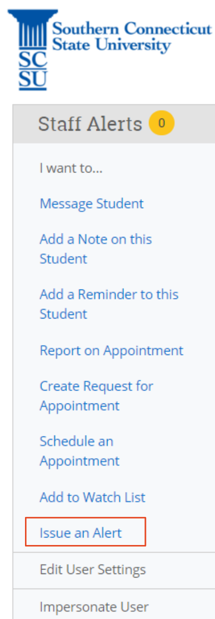
List of Students

To issue an alert from a list of students, whether that be a list acquired from Advanced Search, a Student List, or your assigned students, simply choose the student(s) you wish to issue an alert for, and from the "Actions" drop down menu select "Issue an Alert".

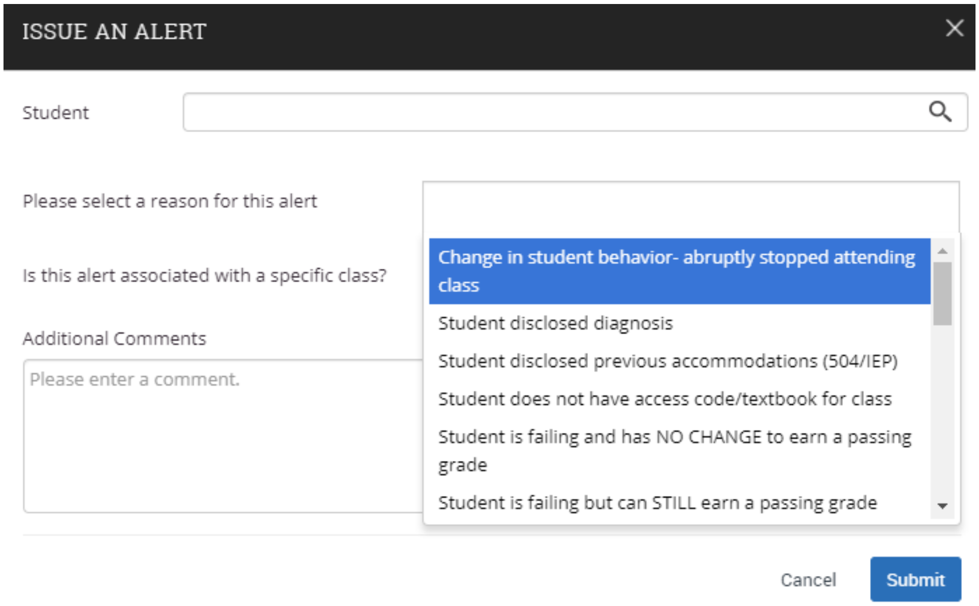


Student's Homepage

To issue an alert from the student's home page, navigate to the student's homepage by using advanced search or quick search, and under the "Staff Alerts" menu on the right-hand side of the page, select "Issue an Alert".



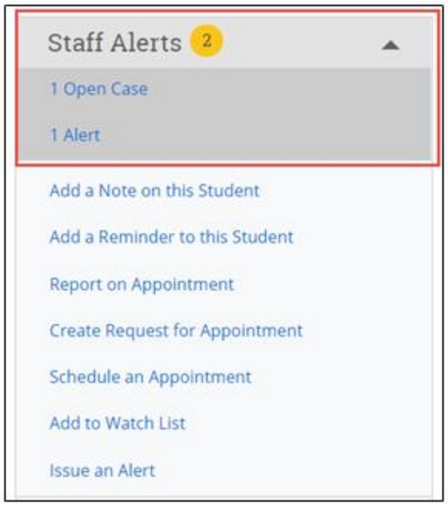
Once you have selected "Issue an Alert" through one of these methods, the alert dialogue box will appear.



- **Alert Reason**: Select an alert reason(s). You <u>CAN</u> select multiple at a time, so you do not need to send multiple alerts per student.
- **Association with Specific Course**: You have the option to associate this alert with a specific course. You can only select one course per alert.
- **Additional Comments**: Enter all comments related to this alert.

Reviewing Alerts

Once the alert has been issued, you can view alerts through the student's profile. To view alerts on a student's profile, first navigate the student you are interested in seeing alerts for. Then, on the right-hand side of the profile, under 'Staff Alerts' you will see an option that says '1 Alert', or whatever number of alerts that particular student has.



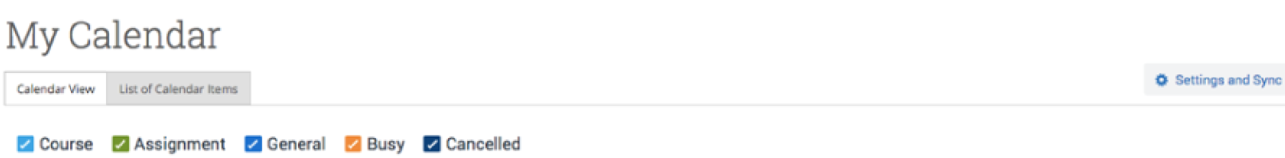
Availability

Availability allows staff to indicate the days, times, locations, and services for which they are available to meet with students. Staff can choose whether the availability active duration is for a specific term, a specific set of dates, or forever. Staff can set availability for appointment scheduling, drop-in visits, and/or appointment campaign purposes.

Syncing Outlook Calendar

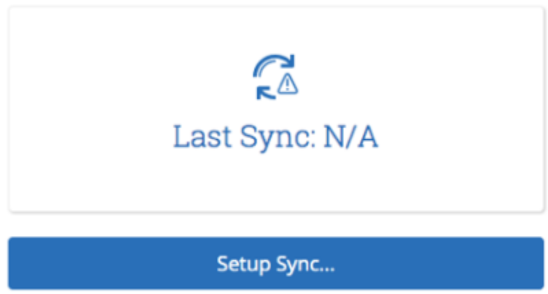
It is important to sync your professional calendar to the Navigate platform so that appointments can flow between your Navigate Calendar and professional calendar, blocking off that time and preventing double booking.

To sync your professional calendar to the Navigate platform, select the calendar icon from the left-hand navigation bar.



If you have not yet set up sync, you will see the image below:

Calendar Settings



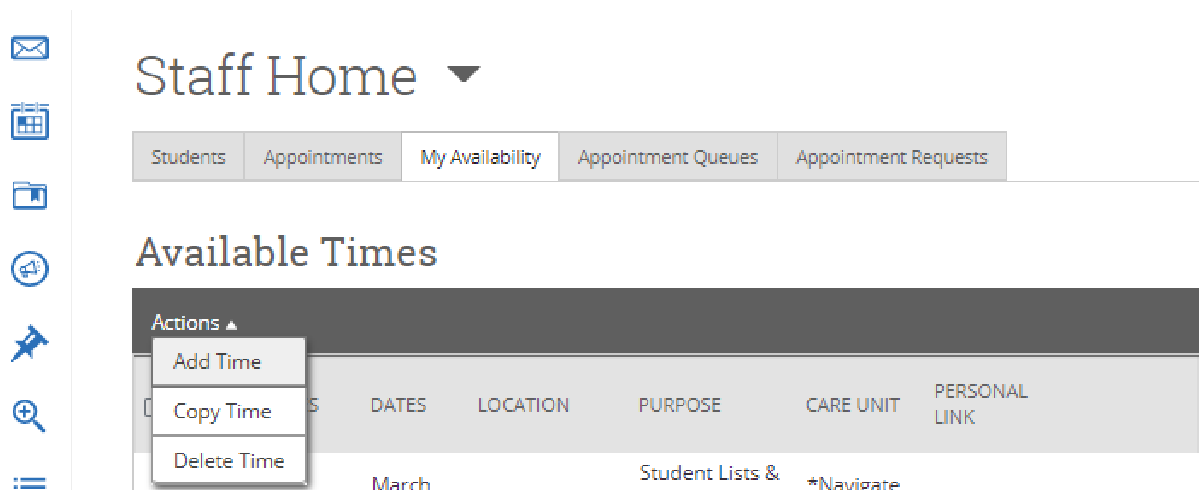
Select ‘Setup Sync’. The calendar settings: Setup page will open. From here select Outlook Service Accounts and the sync will automatically begin. Allow Navigate up to ten minutes to complete the full sync of your calendar.

Note: Items that sync from your professional calendar to the Navigate calendar will appear as ‘Busy’ on the Navigate calendar.

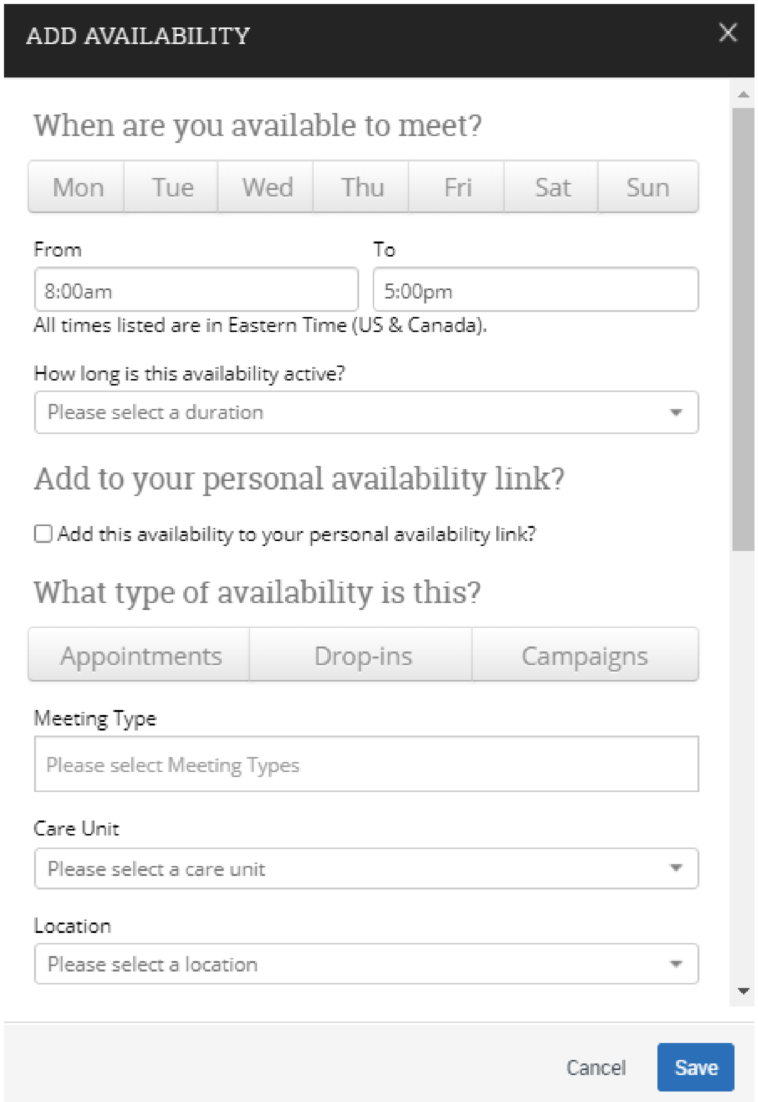
Note: You only need to sync your calendar once. After the first time you set it up, it will continue to sync automatically.

Creating Availability

On the Staff Homepage, select the ‘My Availability’ tab and then ‘Add Time’ from the Actions drop down menu.



The Add Availability window will appear, and you can enter your availability details. The options are described below.



- **How long is this availability active?**
  - Current Term: Availability will be active for the duration of the current term
  - A Range of Dates: Pick a specific range of dates to offer the availability
  - Forever: Availability will always be active
- **Add to your personal availability link?**
  - Check this box if you would like to add this availability to your personal meeting link that you can provide to students.
- **What type of availability is this?**
  - Appointments: Select this option when you want students to be able to make appointments with you during this time.
    - Note: Appointment availability has pre-set appointment lengths determined by administrators. So, if you put in appointment availability between 9am and 12pm, that time slot will

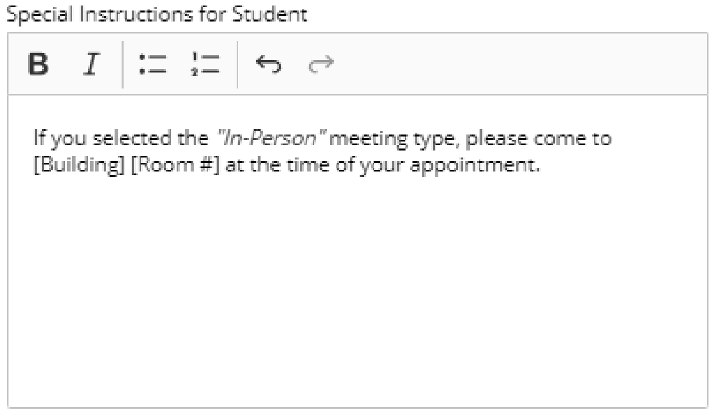
automatically be divided into predetermined 15, 20, 30, or 60-minute slots for students to choose from depending on the service you are offering.

- Drop-ins: Select this option if students will be dropping in.
    - Note: This only applies to departments/offices using kiosks or computers to sign students in for drop-in appointments using Kiosk Mode.
- Campaigns: Select this option if you would like to use that availability in a campaign.

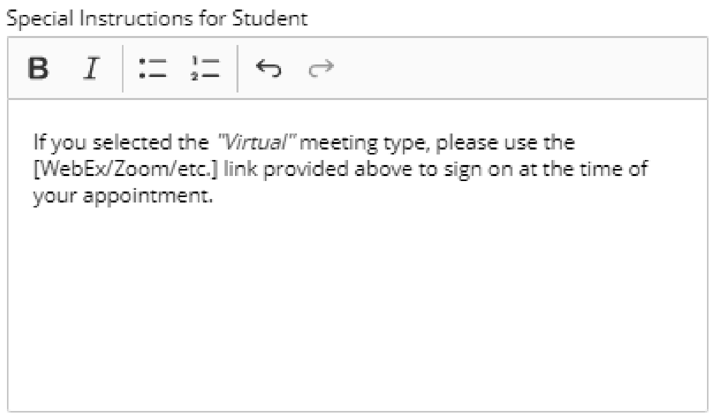
- **Meeting Type**
    - In-Person
    - Virtual
    - Phone
    - Note: You CAN select multiple meeting types per one availability.
- **Care Unit, Location, Services**
    - Select your desired care unit, location and service. Options will vary depending on which care unit you select.
- **URL/Phone Number**
    - In this field enter your phone number, or WebEx/Zoom/etc. personal meeting link.
- **Special Instructions for Student**
    - Special instructions are the ***most important*** step of the availability. The information you enter here will tell the students about how they will be attending the appointment. After scheduling the appointment, the student will receive a confirmation email that lists the “Additional Details” that you enter here. Without the special instructions, students will not know where to access/attend the appointment. See below for a Special Instructions template.

Below are three templates to use within your special instructions. Be sure to use one, two or all three of these depending on how many meeting types you add to your availability.

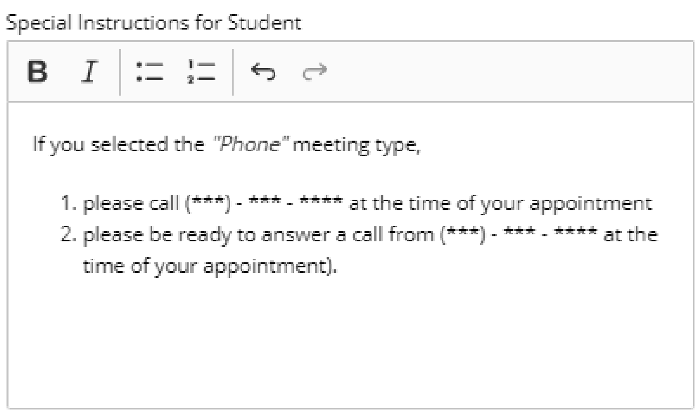
Option 1 – In-Person:



Option 2 – Virtual:



Option 3 – Phone:



Personal Availability Link (PALs)

Once you set your availability, as mentioned above, you have the option to include each of your availabilities within your Personal Availability Link, also known as your PAL.

When you include an availability in your PAL, the link will be generated and displayed below your availability:

The PAL will bring students directly to your availability, and eliminate steps previously needed to pick what type of appointment they are scheduling and what service they are looking for. Instead, they will be brought straight to the times that you are available for the service that you chose to offer, significantly reducing the number of steps a student needs to make to schedule with you.

For any questions regarding the PALs, please refer to our FAQs ***here***, or email ***navigatehelp@southernct.edu***.

Editing Availability

On the Staff Homepage, select the ‘My Availability’ tab. To delete or copy an exsting availability, simply click the check box next to the availability that you would like to chose and then use action menu to either edit, copy, or delete the desired availability.

- **Copy Time:** Copying time can be useful when you want to add another day or time of availability and do not want to select the type of appointment, Care Unit, Location, and Services again. If you are going to be available for the same service in the same location but on a different day, you can use the copy time option to duplicate an existing availability and then change the times and days that were previously selected.
- **Edit:** If you have selected something incorrect in the original availability, or your availability has changed to a different time or day, you can you the edit feature to change an existing availability to the new or updated version.

Days Off

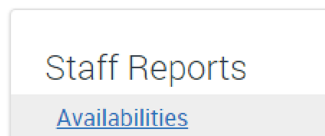
It is important to keep in mind that on days where you are sick, on vacation, or out of the office for any reason that students will still be able to make appointments with you during your regularly scheduled hours. To avoid a student booking an appointment with you when you are out of the office, be sure to have your professional calendar synced with Navigate. As long as you add the reason that you will be out of the office to your professional calendar with the times that you will be unavailable, Navigate will block those times off as "Busy" and prevent students from scheduling during those times.

Student Worker Availability

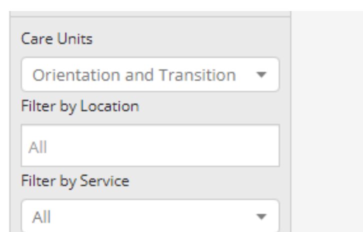
If you are in an office where you need to enter student worker availability within Navigate, you will need to follow these steps to do so. Before following these steps, note that you need to have special access to enter availability for your student workers. If you cannot do the below, it is most likely because you do not have the proper permissions.

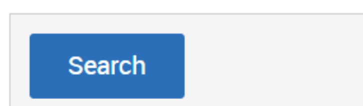
Step 1: Navigate to the Reporting page.

Step 2: Select the "Availabilities" report under "Staff Reports".

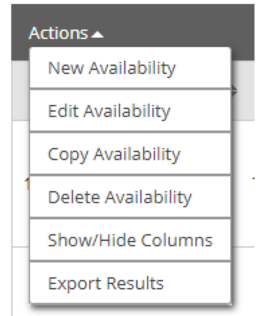


Step 3: Select the Care Unit that you are adding student worker availability to. In our example, we will do Orientation and Transition. Then, select search.

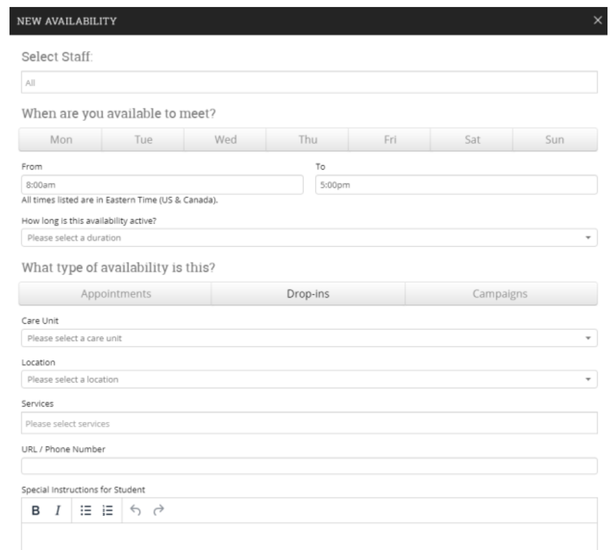




Step 4: Once you select search, you will see the “Actions” button where you will be given a drop-down menu. Select “New Availability”.



Step 5: Now, you will see the following box appear. Under the “Select Staff” you can type the last name of the student worker you are adding time for and then select their name from the list. Once the student worker is selected, you add the availability the same way you would for an ordinary availability. To see details on how to add times, see the availability section of this guide.



Make sure you select the appropriate care unit location and service for your student workers.

Note: If there are times and days that are different, you will have to create multiple availabilities.

Appointment Campaigns

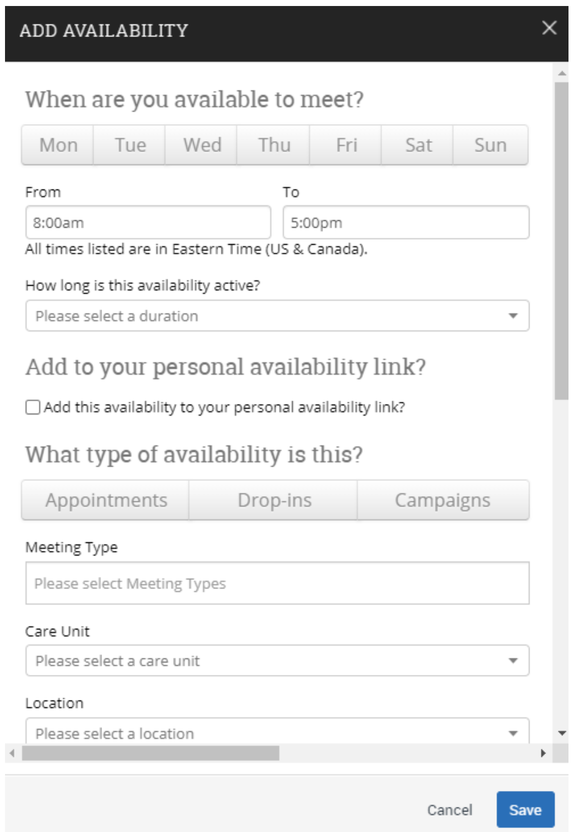
What is an Appointment Campaign?

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. This functionality is commonly used when you have identified a population of students in need of additional support, and you are sending them a request to schedule an appointment with you.

Creating an Appointment Campaign

Step 1 – Define your Campaign Availability

To define your campaign availability, on the Staff Homepage, select the 'My Availability' tab and then 'Add Time' from the Action drop down menu. The following screen will appear.



When are you available to meet? – Select one of the days and times you want students to be making availability with you for this campaign. You may have to define multiple availabilities for different days and times.

How long is this availability active? – Here you can either select the current semester, or a range of dates. If you have the same availability every Monday for example, you can just select the current semester, and the campaign dates will show the availability only on the range of dates that the campaign is running for. If you have different times on different days, you can select range of dates and make the range just the one day that you want that availability showing for.

Add to your personal availability link – Leave this unchecked. Personal Availability Links are for appointment availability, not campaigns.

What type of availability is this? – Campaign.

Meeting Type – Select the meeting type(s) you would like to offer. You can select multiple meeting types. Students will be able to choose from the options depending on what you offer.

Care Unit – Select the Care Unit that you work within, if you are creating an Advising Campaign, you will select Academic Advising.

Location – Your location will be your department for Faculty Advising Campaigns.

Services – The services that appear as options in this step will depend upon what Care Unit you selected in the previous steps. Below is a table of available services for the Academic Advising Care Unit and what you should use each for.

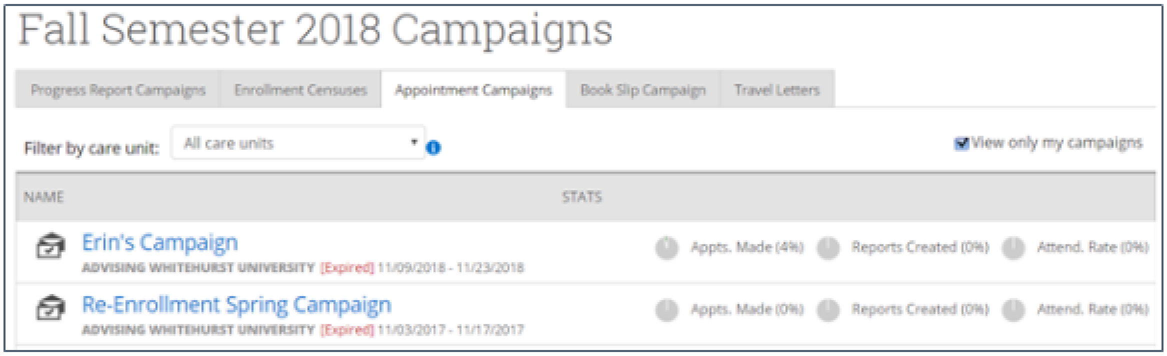
Service	*Description*
Assigned Academic Advisor	This service can be used to discuss course registration/planning with your advisees.
Workshop/Event	This service can be used for group advising, information sessions, etc.
Faculty Office Hours (15-minute) Faculty Office Hours (30-minute)	These two services can also be used to invite students in your classes in for appointments or advise advisees.

<u>Note:</u> When defining your availability, make sure that all these fields are correct. When you move onto one of the next steps, you will need to define the campaign. You must have the *exact* same <u>Care Unit, Location and Service</u> for BOTH your availability and the Campaign in order for this availability to show up for the campaign. If even one of these aspects is different the availability will not appear.

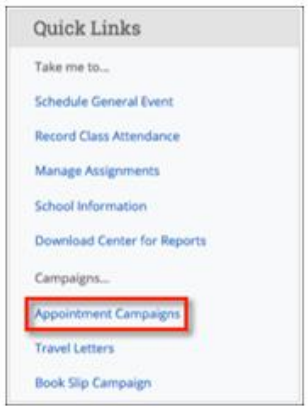
Special Instructions – Be sure to add special instructions to each availability, one line for each Meeting Type you are offering. This will let students know where to go/what to do depending on the meeting type they chose. For example, for in person list the building & room number and for virtual give directions to access the appointment. If you chose both meeting types, include both instructions.

Step 2 – Launching the Campaign

To create an appointment campaign, first select the "Campaigns" option from the left-side tool bar.

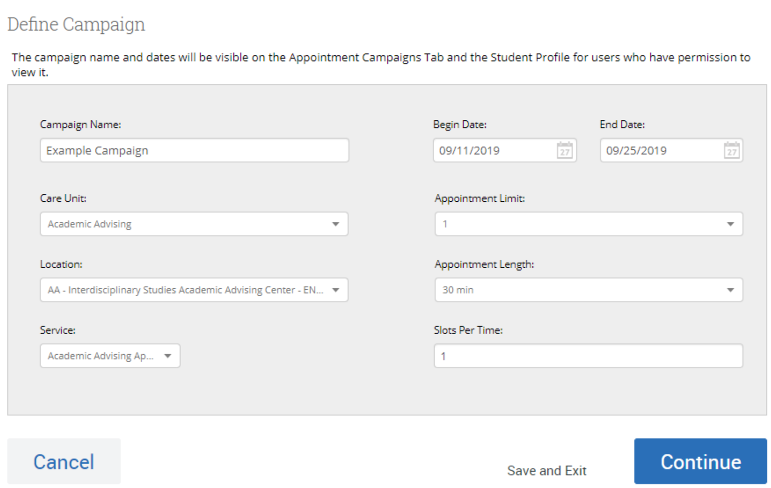


From here, under the Actions section on the right-hand side, select 'Appointment Campaign. You can also find this under 'Quick Links'.



Step 3 – Defining the Campaign

Next, you will have to define the campaign. Below are the categories in which you will have to establish the parameters of your appointment campaign. In this example, you will see a campaign designed for Advising Appointments.



- **Campaign Name** is visible to the person creating the campaign, but not visible to the students. Always start campaign names with the most important info and make names as specific as possible (i.e. F16 Freshman Reg. Campaign).
- **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. For advising appointment campaigns, select your department (i.e. "Accounting Department").
- **Service:** Select the Student Service that will be associated with the campaign. This should be the same service that you selected for your availability in Step 1.
- **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 can be up to 90 minutes.
- **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.

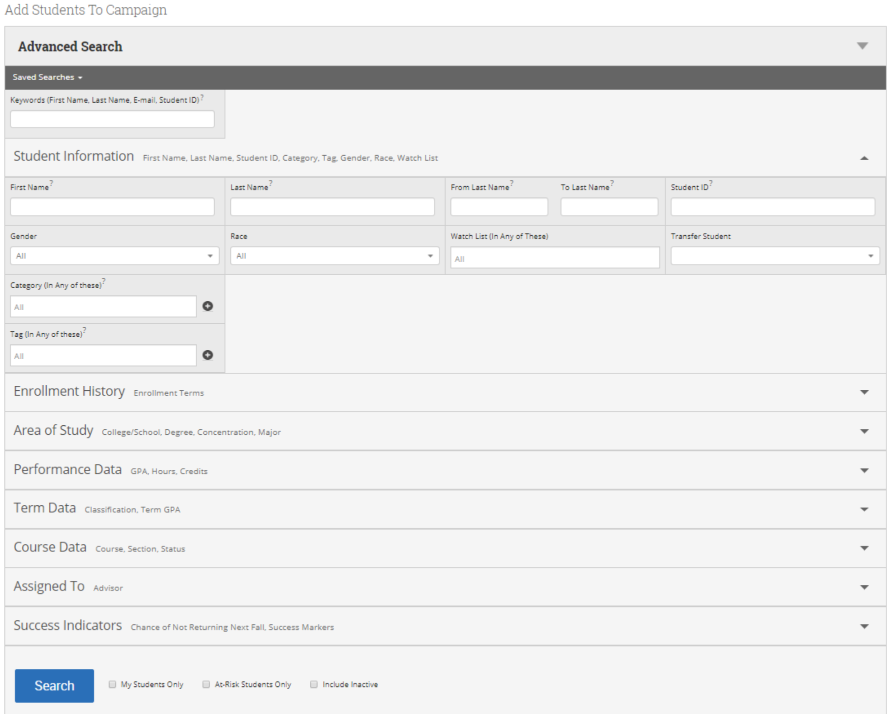
Once you have defined your campaign, you can select the 'Continue' option to move onto adding students to the campaign.

Note: You can also save the campaign and exit at any time during this process.

Step 4 – Adding Students to the Campaign

When adding students to the campaign, if it's an Advising Campaign, you will see an option that says, "Invite All My Assigned Students". Click this, and all your assigned students will be added to the campaign.

You can also add students to the campaign by using the advanced search function. You have the option of typing in parameters to search for students to invite to the campaign, or you can use a saved search. This is how to add students in your classes to the campaign. To use a saved search to add students to the campaign, simply open the drop-down menu below 'Advanced Search' that says, 'Saved Searches' and choose the search you wish to use from this menu and click 'Search'.



Now, all the students that return from your search will appear. You can then select all of the students from your search to add to the campaign by selecting the ‘ALL’ check box. Alternatively, you have the option of selecting specific students from the search by checking the box next to their name. Once finished, click Continue to move to the next page. You will be asked to review the students in the campaign. If these are correct, click Continue.

Note: You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed in the following “Review Students” step.

Step 5 – Add Staff to the Campaign

Once you get to this step, all advisors that are available for the campaign you have set up will appear. You should always choose yourself in this step. If your name is not appearing, you most likely have not defined campaign availability, or there is an issue with your campaign availability (double check Step 1).

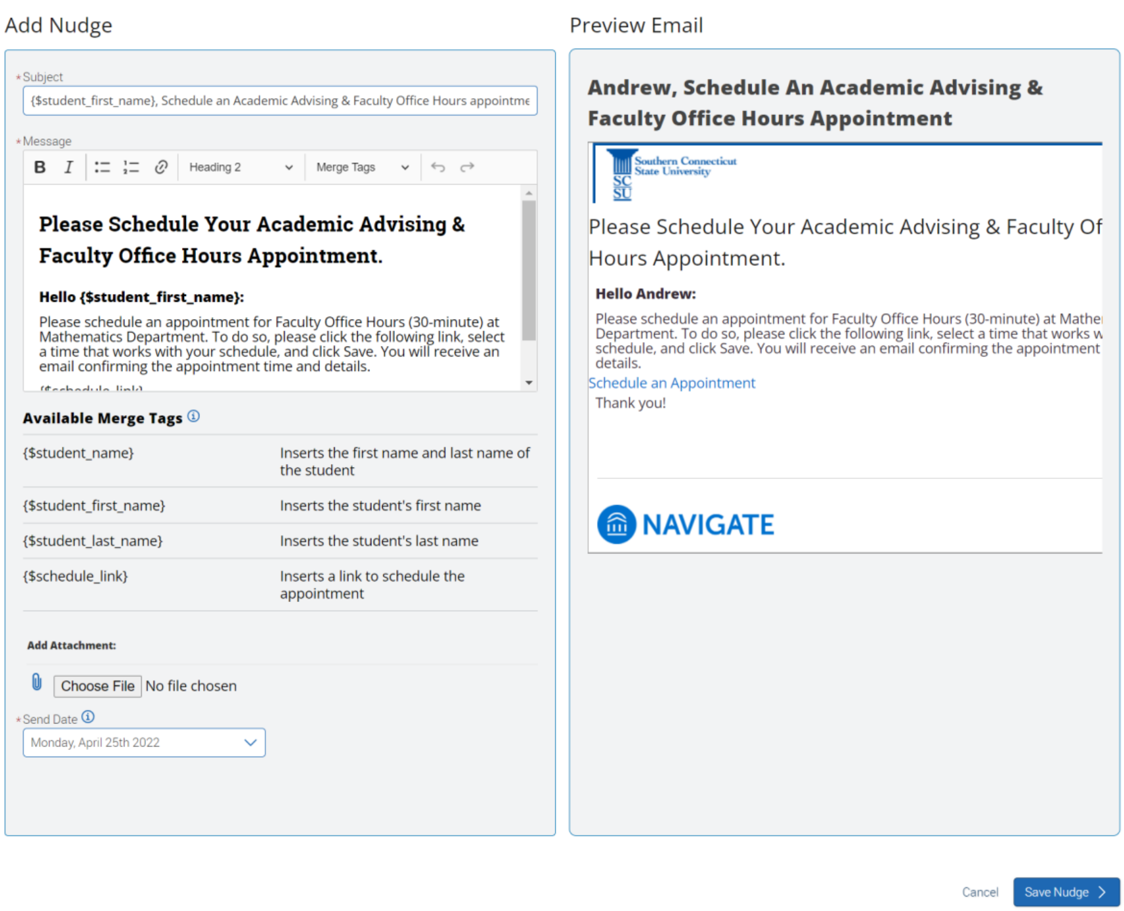
Note: If you want to use your appointment availability for your campaign, you must select ‘Include Appointment Availability’. Make sure that the Care Unit, Location and Service for your availability are all the same as your campaign, to ensure that your availability will appear in this step.

Step 6 – Compose Nudges

Your final step is to compose nudges. This is where you will draft the initial email that students will be sent when you send the campaign and any nudges/reminders that you would like to be sent automatically on a certain day to students who have not yet scheduled their appointment.

Select "Add Nudge" to compose the initial email students will receive inviting them in for the appointment. *Do NOT remove {$schedule_link} from the email body. This is what inserts the link that the students will use to schedule an appointment with you.* Other than this, you can change anything in the email and select the send date as the start date for your campaign. Once you have completed your message, click Save Nudge.

Repeat these steps for any reminders you would like students to receive if they have not yet scheduled. You can choose the day in which you would like the reminder to be sent, and adjust the email to say something like "Second Notice", "Third Notice", etc.



Step 7 – Send you Campaign!

The final page will show you a summary of your campaign. Review all of the information regarding your campaign and click Send when you are ready to complete the campaign set up.

Note: Once you send the campaign you cannot change the Care Unit, Location or Service defined in Step 3. So, make sure these are correct!

Managing an Appointment Campaign

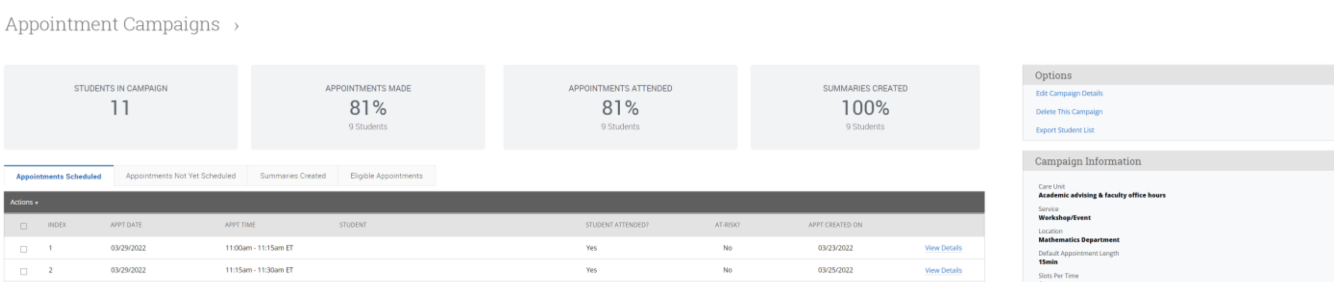
To access existing appointment campaigns, select the campaigns option from the left-side tool bar. Next, select the Appointment Campaigns tab.

On the Appointment Campaigns tab, you will see three at-a-glance statistics if the campaign is active: **Appts Scheduled, Summaries Created,** and **Appts Attended**.

Here are the definitions for these metrics:

- **Appts Scheduled:** The % of appointments scheduled by students on the outreach list
- **Summaries Created:** Of the appointments scheduled, % of summary reports filed for those appointments
- **Appts Attended:** Of the appointments scheduled and summary reports filed, % of students were marked as having attended the appointment

To manage an appointment campaign, just select the name of the appointment campaign that you are interested in.



This page allows you to edit or delete the campaign. It also gives you crucial information about the campaign, broken down into four tabs of information, described below.

Appointments Scheduled: This tab lets you see which students have made appointments.

Appointments Not Yet Scheduled: This tab will display those students who have not yet made their appointment(s).

The Actions menu on either of these tabs allows you to Send a Message, Add Notes, Resend the Campaign Email, or Add Tags for the students.

Summaries Created: This tab will list any summary reports made from the campaign. From this tab you can view the detailed report or delete the report.

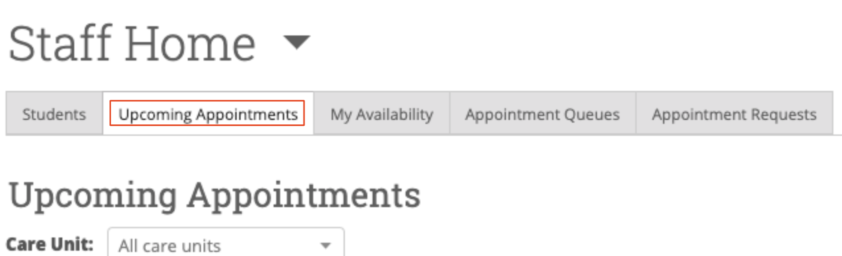
Eligible Appointments: This tab allows you to associate appointments that should be counted toward the campaign metrics but were scheduled outside of the campaign link. For example, a student could be included in a campaign even though they did not schedule the appointment by following the link in their email; instead, they called the location or just walked-in for the appointment. The Eligible Appointments tab allows a staff member to associate that student's appointment with the campaign.

To associate an eligible appointment with the specific campaign you are currently viewing, click into the "Eligible Appointments" tab. Appointments will only display as eligible if they have the same care unit, location, service, and the student is in the appointment campaign. Select the appointment from the list shown. Then select "Associate Appointments" from the Actions drop down menu. Now that appointment will count as an appointment made in your campaign statistics.

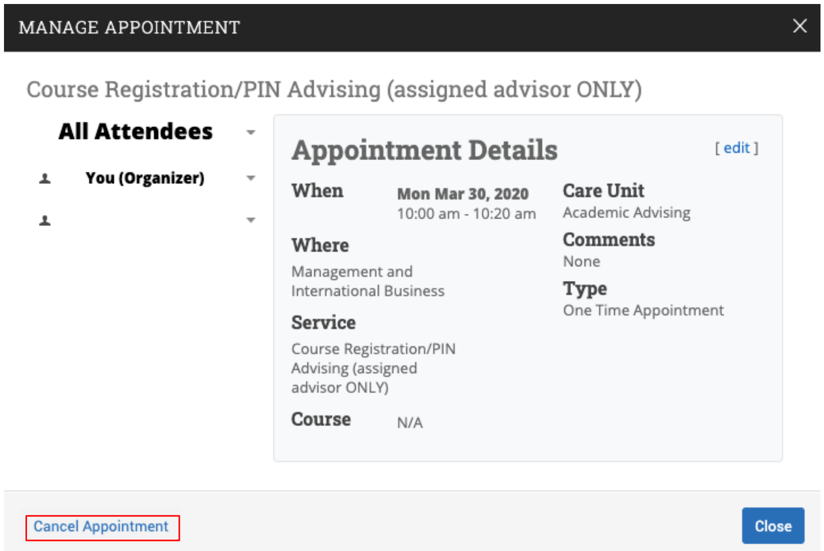
Canceling an Appointment

If you wish to cancel an appointment that has been already scheduled, below is how to do so.

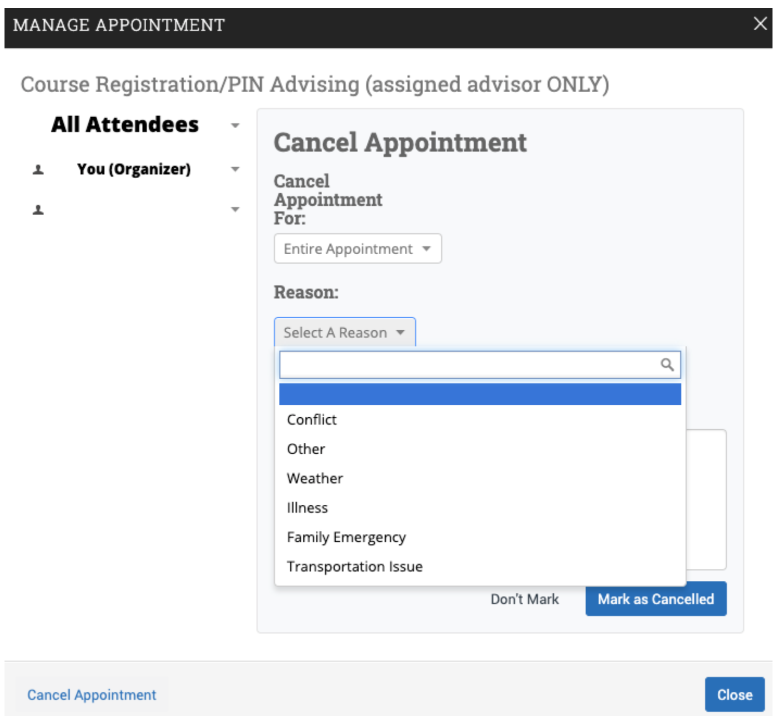
On your staff homepage, you will see a tab called 'Upcoming Appointments'. Select this.



Once you are on this page, find the appointment that you would like to cancel, and select 'Details' located to the right of the appointment information. Select this, and the following pop-up will appear:



Select 'Cancel Appointment'. Then, select cancel 'Entire Appointment' and a reason for the cancellation. Once you have filled everything out, select 'Mark as Cancelled' and then you are done.

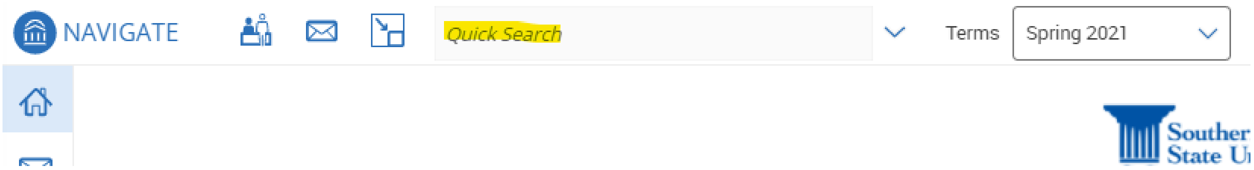


Viewing a Student's Profile

Quick Search

To access a student's profile, you have two options. The first is by finding them using the Advanced Search feature and then selecting their name. The second is by using the quick search feature.

Quick search allows you to conveniently search for a student using their first name, last name, or Student ID. The quick search feature can be accessed from any page in Navigate. To initiate a quick search, simply click into the search bar at the top of the page and enter the desired search criteria.



Overview

The Overview tab is organized into several different sections. The top gray box, also known as the **30-Second Overview,** offers faculty and staff the opportunity to gather a basic understanding or "gut check" on the student's academic performance to date.

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

Basic information such as the student's ID, classification year, most recent enrollment, and declared major are also listed on the Overview tab. When available, the tab shows the student's assigned advisor(s) and Alternate PIN.

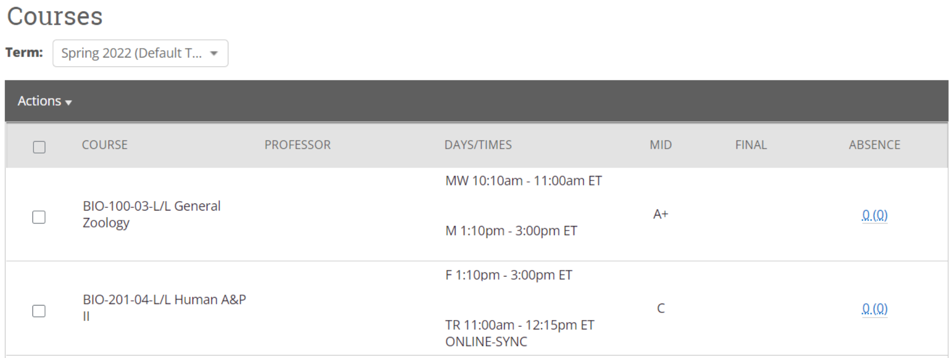
History

This section of the student profile collects recorded activity for that student, including appointments, alerts, reminders, notes, appointment summary reports, and progress reports. You will only be able to view activity within Care Units for which you have the appropriate permissions.

Courses

The Class Info tab of the student profile contains detailed historical and current course information for that student.

The **Courses** section provides a list of the student's currently enrolled classes. The term can also be changed to see previous semester course enrollment. For each class, the associated professor(s) and meeting times/location are listed, and if available, the student's mid-term grade, final grade, and absence record is shown.


Courses

Term: Spring 2022 (Default T...

Actions

	COURSE	PROFESSOR	DAYS/TIMES	MID	FINAL	ABSENCE
☐	BIO-100-03-L/L General Zoology		MW 10:10am - 11:00am ET M 1:10pm - 3:00pm ET	A+		0 (0)
☐	BIO-201-04-L/L Human A&P II		F 1:10pm - 3:00pm ET TR 11:00am - 12:15pm ET ONLINE-SYNC	C		0 (0)

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


Term Details

Fall 2022

-- (3)	ENG112 | LEC	Writing Arguments	RW
-- (3)	HIS110 | LEC	United States History I	RW
-- (3)	HIS200 | LEC	Historical Mthds and Mat...	RW
-- (3)	MAT103 | LEC	Mathematics for Liberal ...	RW
-- (3)	SPA101 | L/L	Spanish II	RW

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	0.0
Cum GPA:	0.0
Academic Standing:	

Spring 2022

-- (3)	*CSC200 | LEC*	*Info Mgmt/ProductivityS...*	*B+*
-- (3)	*ECO100 | LEC*	*Principles of Macro-Econ...*	*A*
-- (3)	FIN200 | LEC	Critical Thinking in Finance	RE
-- (3)	*INQ101 | LEC*	*Intellectual/Creative Inqu...*	*C+*
-- (3)	*MAT112 | LEC*	*Algebra for Business & Sc...*	*A+*

Term at a glance:

Credits:	-
Credit Comp %:	-
Term GPA:	0.0
Cum GPA:	0.0
Academic Standing:	

Pre-Enrollment and Progression

English Placement:	1
English Placement:	1
English Placement:	2
High School Spanish Level:	3
High School Spanish Level:	3
Math Placement Exam:	112
Math Placement SAT/ACT:	112
SAT Math 10-40:	30.0
SAT Math 200-800:	600
SAT Reading 10-40:	28
SAT Reading-Writing:	540
SAT Writing-Lang Test:	26
Spanish Placement Test:	101
High School Cum GPA:	2.56

High School: High School

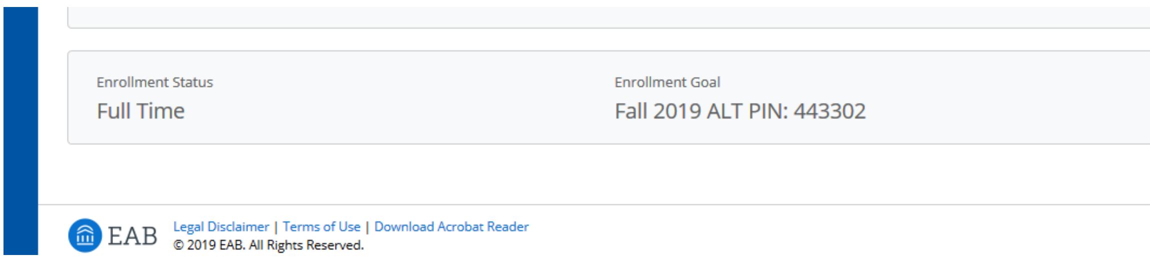
Note: You will see all transfer courses, no matter what semester they were taken under the "Transfer" area of Term Details. If you would like to see what semester a student transferred in a course, please refer to Banner.

Student Advisor Appointments

Registration PIN

An undergraduate student's registration PIN is very important in that they cannot register for classes without it. The university also requires that the student meet and review their Degree Evaluation in person with their advisor before receiving their PIN.

When a student has been issued an active PIN, they can be found in Navigate on the Student Overview page. Generally, PINs get put up at the start of student advising sessions and are removed sometime after the student has registered.



Note: PINs that begin with '9' indicate the student is an athlete and has early registration status.

Notes and Appointment Summary Reports

Appointment Summary Reports Vs. Notes

Appointment summaries are used to document any type of meeting with a student whether it be scheduled, or drop-in. Notes are any general record you would like to record for a student such as phone/email conversations that are *not* associated with a specific meeting. Please be sure to write each accordingly.

For what to put and not to put in Notes and Appointment Summary reports, see the below Guidelines for Notes and Appointment Summary Reports.

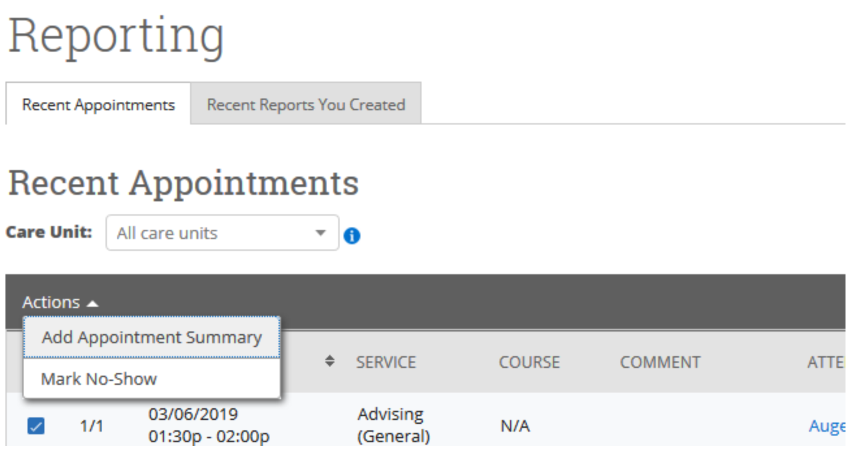
Creating an Appointment Summary Report

Please read the Guidelines below for Notes and Advising Summary Reports.

Appointment Summary Reports are used to document any type of scheduled/drop-in meeting with a student. Please be sure to write up an Appointment Summary Report after each advisement meeting and add notes about email or phone conversations. This allows you to quickly reference past discussions with your advisee and allows other advisors to see what was previously discussed, planned courses, and other related information.

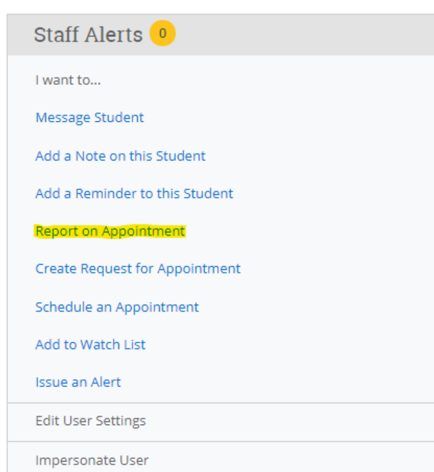
For a Scheduled Appointment

If you wish to write an appointment summary report for an appointment that was scheduled through Navigate, such as through a Campaign, on your SSC Home Page (or under the "Upcoming Appointments" tab), you will see a list of your recent appointments under "Reporting" at the bottom of the page. Use the Action drop down to select, either **Add Appointment Summary** or **Mark as No Show.** If you mark as no show, you will have the opportunity to add any additional information about the no show to the summary (i.e., Student emailed/phoned to cancel, student did not show or cancel).

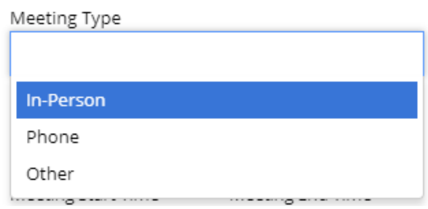


For a Drop-In Appointment

If you wish to write an appointment summary for an appointment that was a drop-in and was NOT scheduled through Navigate, such as through a campaign, then you should Navigate to the student's profile and use the "Report on Appointment" option from the quick menu on the right-hand side of the student's profile. Doing this creates the appointment and adds the appointment summary report all in one.



If the appointment was over the phone/via email, whether it be drop-in or scheduled, you can specify this in the appointment summary report by selecting the following options from the "Meeting Type" portion of the appointment summary report:



When writing the appointment summary report, be sure to include major points of discussion (i.e., planned courses, discussions about academic warning/probation, planned minor, review of DE/What if). If you do not give the student a PIN for some reason, please note that and the reason in the report (i.e., Student reports they want to change major to SOC, referred them to SOC for advisement and PIN).

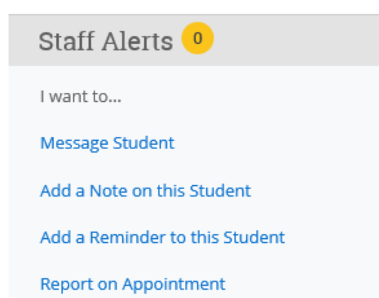
Note: If you create an appointment summary report by selecting "Report on Appointment" from a student's profile for a *scheduled appointment* this will create a duplicate of the existing appointment. Always use "Recent Appointments" to write appointment summary reports for scheduled appointments to avoid this.

Adding a Note to a Student's Profile

Please read the Guidelines below for Notes and Advising Summary Reports.

Notes are used to document email/phone conversations and other contacts with advisees that are less detailed than an appointment summary. Notes are a general record not associated with a specific meeting.

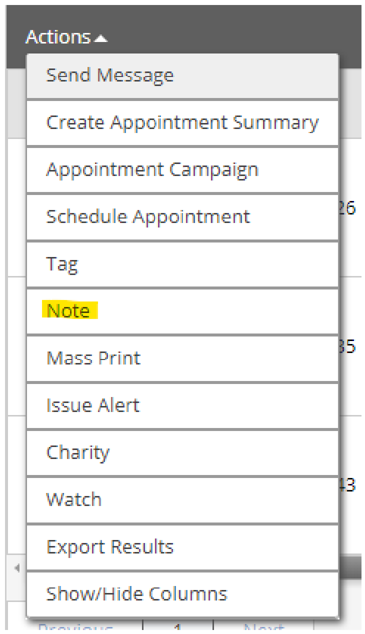
To add a note to a **single student**, open Navigate to the student's Overview Page. On the right-hand side of the page, you will see the following box:



Select 'Add Note on this Student'. From here you can cut and paste and email exchange into the note or provide an overview of a conversation or phone call you had with the student.

To add a note to a **group of students**, which can be useful when managing a group advisement session or workshop, select the Advanced Search option from the left-side tool bar and create a search to find the students who attended. If you have a list of students by name, email or Student ID, you can copy and paste the list into the search box and then click ‘Search’.

From here, you can select the ‘ALL’ button and then move to the Action menu and choose ‘Note’.



Guidelines for Notes and Advising Summary Reports

Introduction

In the Student Success Collaborative (SSC) Navigate platform, notes and appointment summary reports are recorded by faculty, professional advisors, athletic coaches, academic coaches and tutors in the Academic Success Center, staff from the Summer Educational Opportunity Program, Residence Life, Veteran’s Affairs, Financial Literacy, and other university officials. All such university employees documenting in the SSC platform will be referred to as “advisors” below. Further, all notes and appointment summary reports submitted in the SSC platform will be referred to as “appointment summaries” below.

All student records maintained in the SSC platform are protected under the Family Educational Rights and Privacy Act as part of students’ official university records. Academic records are property of the student, may be requested for review, and are subject to subpoena.

Family and Education Privacy Act (FERPA)

University officials may access student educational records via SSC Navigate if they are preforming one or more of the following:

- A task related to a student’s education or discipline

- A task pertaining to assigned duties at the University
- Maintenance of security and safety on campus

For more information on FERPA, please see the ***U.S. Department of Education FERPA Guidance and Notices.***

Benefits of Notes and Appointment Summaries

Comprehensive Reports Submitted in SSC Navigate Offer the Following Benefits:

- Provide a factual summary of an advising contact that occurs in person, via phone, or through electronic communication
- Improve advising efficiency and effectiveness by documenting observations, interventions, and academic progress sequentially
- Provide continuity to student advising experiences by helping advisors understand the advice a student has previously received

Sensitive Information

Academic advisors and support staff should exercise prudence and professional judgement when document topics that contain sensitive information. Subjects considered sensitive include disability, religious and/or political affiliation, perceived or disclosed sexual orientation, any medical diagnoses, or information that could be potentially detrimental to the student if it were revealed to a third party. If a student does disclose personal information of a sensitive nature, do not include the details in a note or appointment summary. Instead, write that "personal information" or "personal circumstances" were disclosed.

Recording Sensitive Information

- When recording information about conversations or interactions of a sensitive or personal nature, care should be exercised with the language employed; report academically relevant facts. Focus on steps already taken or steps that are necessary to address the circumstance. Do not diagnose, asses or offer judgement upon the student or circumstances.
- When referring students to campus resources, always list the office(s) involved (e.g. Counseling Services, VPAS, Career and Professional Development, etc.) as this information can be used as a cue concerning the issues and a prompt for future follow-up or check-in. Indicate date when referred and if you called the office ahead of time, or walked the student over when applicable. Do not include information about why you are referring the student, simply just include that you referred them and to where.
- Keep the records fact-based and if you are in doubt about what to include, it is always best to leave information out, than to include too much.

Meeting Contact Types

In Person

- All meetings/contact with students should be documented and summarized to include any information that could potential assist current or future advisors and academic support staff in guiding the student to successful degree completion.

Telephone

- All phone contacts should also be documented electronically. When writing an appointment summary, the advisor has the option to select a meeting type. Phone conversation is one choice. Phone contact of substance should be summarized, including general purpose and recommendations made within an appointment summary. If the phone contact was not that of a meeting, but a general record you would like to record, this information should be entered in a Note.

Email

- Emails of substance should be recorded in SSC Navigate. The date, topic and summary or a copy of the email communication should be included/attached to an appointment summary if the email contained meeting conversations. If the email conversation is just a general contact with the student, it can be recorded through a note.
- In evaluating whether or not an email communication should be recorded, the same threshold of value or significance should be used for email as for regular appointment summaries/notes. If the information in the email communication has a bearing on the student's progress towards their career/degree, it should be recorded.

General Guidelines

All substantial contacts with or about a student must be recorded electronically in SSC Navigate either through a report or appointment summary. Appointment summaries should be used to document any type of scheduled/drop-in meeting with a student, whether that be via email/phone/in-person. Notes should be used to document any general record not associated with a specific meeting.

All notes and appointment summaries in SSC Navigate are accessible within the university system, so discretion should be exercised in this documentation.

- When in doubt, leave it out.
- Describe. Do not evaluate, judge or include your opinion in this documentation.
- Keep it simple.
- Do not include sensitive information (see 'Sensitive Information' section to determine whether or not your case falls into this area).
- Leave out information that is not part of the educational record (i.e. law enforcement records, medical records, etc.).

When entering your appointment summaries/notes, assume others will read your reports and ask yourself:

- Is this something you think the student would want other people to know during their academic endeavor at SCSU?
- Is this something another advisor would need to know? Why?
- Are the details in my reports based on fact and not self-perspective or hearsay?

Reports and Notes in SSC Navigate May Contain

- Documentation of actions a student plans to take relating to academic progress
- Documentation of actions taken by the advisor (e.g. permission submissions; catalog term changes)
- Indication of specific university processes, policies and deadlines discussed with a student
- Listing of recommended courses for upcoming registration periods
- Indication that a student missed a scheduled advising appointment
- Indication that a student was given their Alternate PIN for registration
- Documentation of a referral to university resources (i.e. "Referred to Counseling")

Reports and Notes in SSC Navigate Will NOT Contain

- Personal life circumstances students report affecting their academic performance
- Subjective statements or opinions about a student, behavior, or attitude
- Specific financial records
- Specific information/circumstances disclosed by students regarding the following areas:
- Disability Resource Center or a student's self-disclosed disability
- Counseling Service or mental health concerns, on-campus or off-campus
- Student Health Services
- The Violence Prevention, Victim Advocacy and Support Center (VPAS), the Sexual Assault Resource Team (SART) or the Title IX Coordinator

Examples of Effective Documentation in SSC Navigate Reports:

Academics

Academic Standing	Discussed Good standing/warning/probation; explained academic standing rules; discussed strategies for calendaring, time management, and study tips
Add/Drop/Withdrawal	Identified upcoming deadlines; discussed pros & cons; implications of dropping or adding course(s)
Degree Evaluation	Explained how to use and/or interpret; What if Analysis; monitor current degree progress, discussed LEP Tier 1-3 requirements, course sequences, prerequisites, co-requisites and requirements to complete degree program
Graduate Studies	Discussed post bachelor's degree study intentions; reviewed requirements for admission, Graduate Record Exams,

	deadlines, personal statements, and letters of recommendation
Graduation	Determined status of degree requirements; reviewed process to apply for graduation; provided information about commencement ceremony
International Education	Discussed role of study abroad in professional, educational, personal development; discussed courses to be taken while studying abroad; discussed how courses taken abroad will apply to academic program; Referred to the Office of International Education
Intersessions	Discussed opportunities to complete courses during winter and summer sessions on campus and online
Major Exploration	Discussed academic interests and majors; identified courses in intended major; referred to academic chairperson with contact information
Major Declaration	Discussed admission requirements and application processes for specific majors; completed Selection of Degree form; referred to academic advisor
Missed Advising Appointment	Student did not attend scheduled academic advising appointment
Satisfactory Academic Progress	Discussed qualitative and quantitative requirements for maintaining financial aid eligibility; discussed Satisfactory Academic Progress appeal process
Transfer Credits	Reviewed the SCSU Registrar’s Office webpage for the Transfer Equivalency Chart and Transfer credit approval form and process

Student Affairs

Career Development	Discussed post bachelor’s degree plans; referred to career services or relevant career resources; reviewed resume and cover letter
Internship/Co-op	Discussed role of pre-professional experiences in educational plan and resume development
Involvement	Discussed role of involvement in professional, educational, personal development; identified involvement opportunities to complete academic plan and personal interests
Residence Life	Discussed residence hall options, meal plans, credit requirements, and benefits associated with living on campus

Enrollment and Eligibility

Financial Literacy	Reviewed student bill/financial aid status; discussed alternate options for funding for books and other course materials; discussed application for Alumni Scholarships; referred to campus financial advisor

Holds	Followed up on academic/financial/admissions/athletic hold(s)
Readmission	Discussed process for readmission to SCSU; Reviewed Fresh Start program requirements
Transfer Students	Discussed transition to SCSU; referred to resources through the New Student and Sophomore Programs; interpreted transfer credit equivalencies pertaining to degree and major completion
Transferring from SCSU	Discussed advantages and disadvantages of continuing at SCSU, reasons for transferring, and the process for withdrawing
Withdrawal from the University	Discussed process for withdrawal and requirements for readmission to SCSU

When in doubt, leave it out.

Academic Advising Notes Do's and Don'ts

Do	Don't
Briefly summarize what was discussed as it relates to student success for future reference by the student, other support staff, and future advisors:	**Summarize *everything* that was discussed. Notes are intended to be a brief record of advising contacts highlighting recommendations, referrals, and follow-up plans.**
• Recommendations: "Recommended student take MATH 105 because of her interest in Engineering."	• Include unnecessary details: "She said she has been having a good week and is especially excited about moving into a different apartment."
• Advice: "Cautioned against taking 18 credits this semester given work schedule."	• Include personal/sensitive information: See examples below
• Referrals: "Referred to Career Services."	• Include subjective opinions: See examples below
• Action Plans: "Student plans to follow up with ACE Tutoring and schedule an appointment with me after mid-terms."	

Summarize specific course recommendations	Report problems with specific instructors
• "Encouraged student to take HIST 103 as a gen ed."	• "Student doesn't like his MATH 103 instructor."
• "Recommended student take BIOL 150 fall semester 2016."	• "Student said PSYC 111 professor has unfair grading policies."

Spell things out for a general audience	Use acronyms students and other campus support staff may not understand

Write fact-based academic-related notes	Include speculation, subjective opinions, or judgements
• "Student is concerned about grades in two courses."	• "I don't think she is very motivated this semester."
• "Student is considering whether his current major is a good fit. Helped him consider other options."	• "His personality isn't a good fit for STEM fields. I think he'd feel more at home doing something artistic or creative."
• "Student needs to complete BIOL 220 before she can apply for the Nursing Program."	• "She has probably been avoiding BIOL 220 because she struggled with BIOL 150."

Use general or coded language concerning sensitive material	Include sensitive information, personal concerns, private matters
• "Student reported **extenuating circumstances** related to his academic progress this semester."	• "Student's parents are going through a divorce."
• "She discussed a **difficult situation** and requested help from a campus support service."	• "She reported she was assaulted by her boyfriend earlier this year."
• "Student disclosed a **personal situation** that's having an impact on how things are going this semester."	• "Student was recently diagnosed with an autoimmune disorder."

Record referrals made	Report details surrounding sensitive referrals
• "Referred student to Counseling Center."	• "He said he can't concentrate because of relationship problems with his girlfriend. I referred him to the Counseling Center."
• "Referred to Student Health Service."	• "He said he's been having a lot of headaches lately. I'm concerned something more serious may be going on. I suggested he go to Student Health Service to get it checked out."
• "Referred to Financial Aid Office."	• "Little financial support from family. First Generation student with significant debt building up."
• "Referred to Disability Services."	• "Student reported having a lot of test anxiety."

Include notes about positive student behaviors	Include notes about negative student behaviors
• "Student came prepared for session with course plan filled out."	• "She seems like she just blows off advising appointments. I can't get her to be serious and plan ahead."
• "He has spent time talking with two Sociology professors to learn more about potentially changing to that major."	• "He seems pretty uninformed about the real world after college and hasn't followed through with plans to get information from his Sociology professor. I think he needs to be more realistic."

Attach important emails	Attach emails with sensitive/private content that the student likely didn't intend for other campus providers to read

Adapted from North Dakota State University Notes Guide