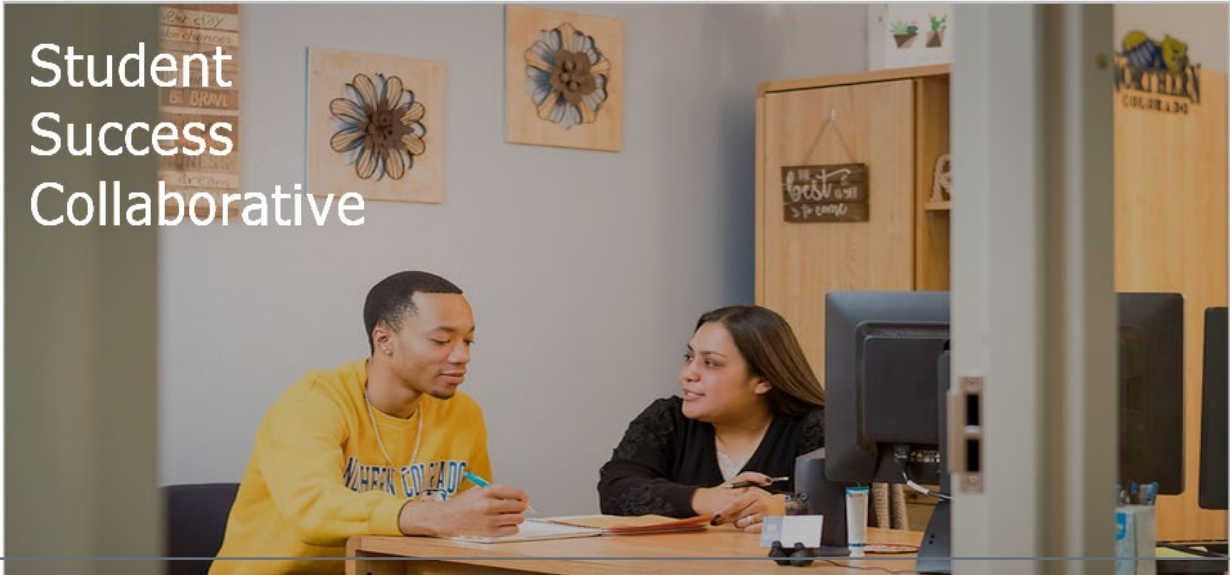




Center for the Enhancement of
Teaching & Learning



Quick Start Guide for SSC Navigate for Advisors

UNC is using the EAB Navigate platform to help students follow a path to timely graduation completion with data, services, and supportive connections. This Quick Start Guide highlights basic features of the platform.

GETTING STARTED

Please use the [Training Site](#) for practice first before sending Campaigns in live site.

Login to SSC Navigate using your university credentials.

<https://www.unco.edu/student-success-collaborative/>

KEY PLATFORM FEATURES

Staff Homepage

- View Your Assigned Students
- Quick links to actions you can take
- Tabs to view upcoming appointments, setting your availability, and appointment queues.

Staff Home

Students | Upcoming Appointments | My Availability | Appointment Queues

Actions

ALL	STUDENT NAME	ID	PREDICTED RISK LEVEL	CATEGORY
<input type="checkbox"/>	1			Academic Standing: Good Standing(GS), Graduated, Z-NCNDIG
<input type="checkbox"/>	2		Low	Academic Standing: Good Standing(GS), BA-ASLEI-CMI, HOLD: AR Past Due - Contact 351-4862
<input type="checkbox"/>	3		Low	Academic Standing: Good Standing(GS), Graduated, HOLD: Contact Dean of Students - Reg. MBA-BA-GBUJ
<input type="checkbox"/>	4		Low	Academic Standing: Good Standing(GS), BS-BUSAD-ACT
<input type="checkbox"/>	5		Low	Academic Standing: Probation 1st term(F1), HOLD: Academic Probation, HOLD: CSCR Reg Hold Suspension,
<input type="checkbox"/>	6		High	

Previous | 1 | Next

8 total results

UNC

Actions

I want to...

Issue an Alert

Quick Links

Take me to...

Schedule a General Event

School Information

Download Center for Reports

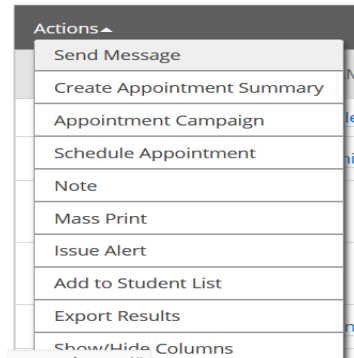
Campaigns...

Appointment Campaigns

Upcoming Appointments

Go back to upcoming appointments.

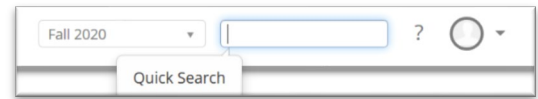
- From Actions drop-down menu, you can Send Messages, Issue Alert, add a selected student(s) to a list, create a Note, and more.



Search and Reference Student Profile

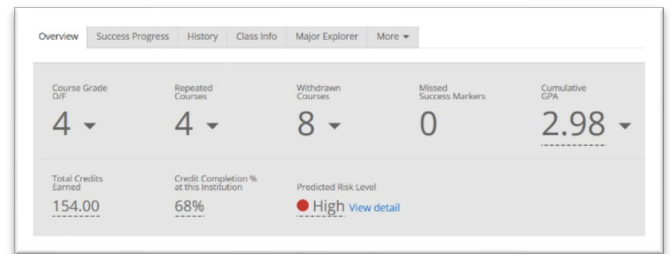
- Enter a student's name through the Quick Search on your Staff Home page.

Uses student preferred name, if cannot find it, use bearmail

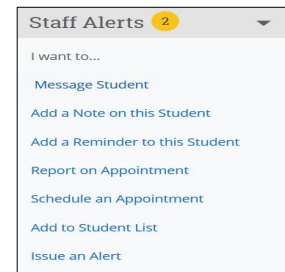


View Student's Academic progress and any areas of concern.

- The various tabs on a student's profile page will show student's progress, history, class information, etc.



- List of possible actions for each student such as adding a note or scheduling an appointment.



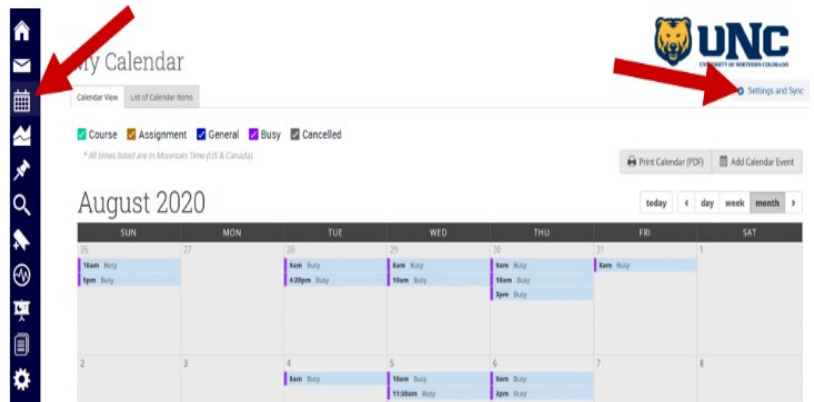
SYNCING CALENDAR AND SETTING UP AVAILABILITY

This is an important first step before students can schedule appointments with you.

To syncing your calendar:

- Click on the "Calendar" icon
- Click on Settings and Sync for Navigate to sync with your Outlook

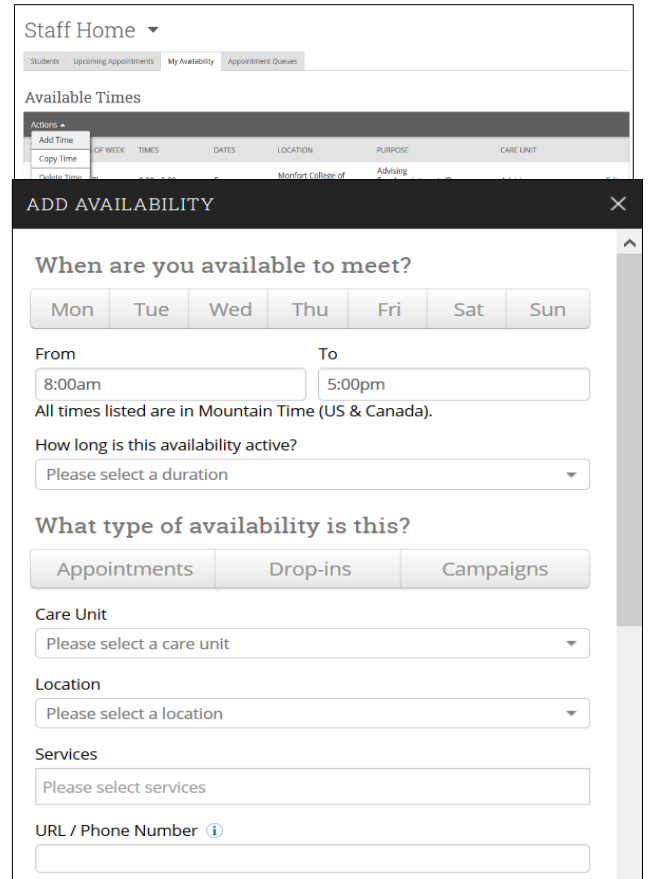
NOTE: The sync may take some time, **be sure NOT to disable** the sync



To set your availability:

1. Click the "My Availability" tab
2. Click "Add Time" from Actions Menu
3. Select the days and times when you are available to meet with students.
4. Select the range of dates this availability will be active.
5. Select whether you will meet with students via appointments or drop-ins or campaigns
6. Choose the Care Unit and the Location where you will be available such as a building or a center within a building.
7. Select which student services will be provided during the availability.

NOTE: locations and services are created by university administrators. If you do not see your location and/or service, please email Stephanie.Torrez@unco.edu to add them in.



**You will only show as available for the services/locations/availability you have set up

8. Add special instructions such as room number.
9. Specify how many students will you see per appointment.
10. Click the Save button.

Repeat this process until all your availabilities have been defined.

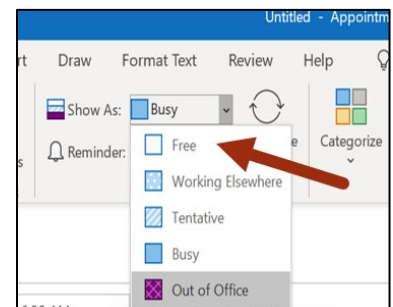
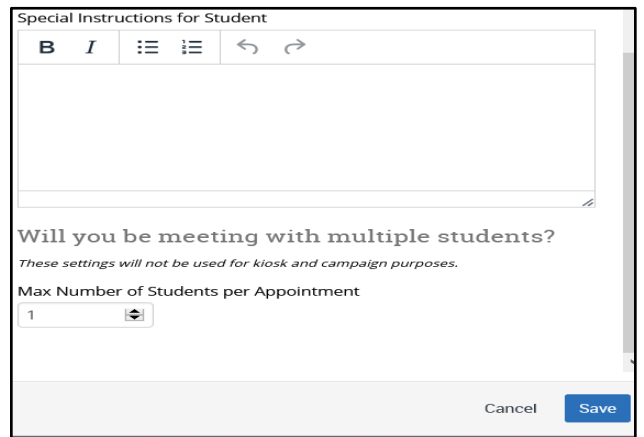
Note: You can have as much availability as needed. There are two other options when adding Times Available.

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied, and a dialog will open allowing you to make edits or to save your newly created availability.

Delete Time- to delete your time, simply select the time and click the Delete Time button.

Note: Inactive availabilities are highlighted in red in the Times Available grid.

*****Be sure to mark any placeholders as "Free" in your Outlook otherwise students cannot make appointments**

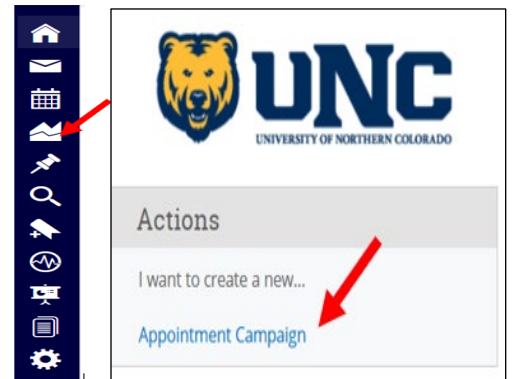


CREATING APPOINTMENT CAMPAIGN

An Appointment Campaign allows staff members to reach out to specific population of students for a specific service.

1. Setting up a Campaign

- Navigating to Campaigns by selecting "Appointment Campaigns" from the left-hand side Quick Links section.
- This will take you to the Campaigns tab.
- Select Appointment Campaign from the right-hand side, under Actions.



2. Defining a Campaign:

- Name your campaign (Students will not see the name of the campaign)
- Select appropriate "Care Unit", "Location", and "Service"
 - NOTE:** These must match with the specifications you have set up on your advisor home page, under "My Availability".
- Set the Begin and End dates for your Campaign.

NOTE: This must match the date ranges you have set up on your advisor home page, under "My Availability". Ensure that you have created CAMPAIGN availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.

A screenshot of the 'Define Campaign' form. The form has a title 'Define Campaign' and a subtitle 'The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.' The form contains several input fields: 'Campaign Name' (text input), 'Care Unit' (dropdown), 'Location' (dropdown), 'Service' (dropdown), 'Begin Date' (date picker set to 10/05/2020), 'End Date' (date picker set to 10/20/2020), 'Appointment Limit' (dropdown set to 1), 'Appointment Length' (dropdown set to 5 min), and 'Slots Per Time' (dropdown set to 1). There is also a checkbox for 'Allow scheduling over courses' which is currently unchecked. At the bottom of the form are three buttons: 'Cancel', 'Save and Exit', and 'Continue'.

- Appointment Limit determines how many times a student can make an appointment with the same Campaign.
- Appointment Length should include additional time for advisors to make notes, create a report, or prepare for next appointment.
- Select 1 slot per time
- Click Continue

3. Adding Students:

- Use the advanced search feature to search for students who should participate in the campaign.
- You can also choose one of your saved searches by clicking the drop-down arrow beside "Saved Searches".
- To ensure that you only return a list of students assigned to you, also click the box beside "My Students Only" next to the Search button.
- Select the students you wish to include in your campaign. Confirm the list of students included and remove or add students as needed.

4. Adding Staff:

- If you have correctly set up your availability for Campaigns, then you should see your name on the next page under "Add Organizers to Campaign". If applicable, select other advisors to join your campaign.

5. Compose Your Message:

- Create a Subject Line for your email
- Edit the text for the email. Default is "Please schedule your advising appointment".
- **IMPORTANT:** Be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.
- Attach any files you want all your students to have.
- In the instructions and notes box, add any details or instructions about the appointment.
- Scroll down to see a preview of what the email the student receives will look like.

6. Confirm & Send:

- Review the details of your campaign. When you are ready, click send to issue the email to students on the list.

Managing Appointment Campaigns

Once the campaign is sent and students have started making appointments, you can see the statistics for each campaign.

NAME	STATS
Erin's Campaign ADVISING WHITEHURST UNIVERSITY [Expired] 11/09/2018 - 11/23/2018	Apts. Made (4%) Reports Created (0%) Attend. Rate (0%)
Re-Enrollment Spring Campaign ADVISING WHITEHURST UNIVERSITY [Expired] 11/03/2017 - 11/17/2017	Apts. Made (0%) Reports Created (0%) Attend. Rate (0%)

Manage the appointments within each campaign. Add Report, message the “No Shows” or students who have not made their appointments yet.

INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	AT-RISK?	APPT CREATED ON		
<input type="checkbox"/>	1	11/06/2017	10:40a-10:45a	[Redacted]	No	No	11/06/2017	View Details
<input type="checkbox"/>	2	11/06/2017	10:50a-10:55a	[Redacted]	Yes	No	11/06/2017	View Details

INDEX	STUDENT	EMAIL
<input type="checkbox"/>	1	[Redacted]
<input type="checkbox"/>	2	[Redacted]

NOTE: Students are notified/reminded of the appointment number of times through emails and SMS if they have provided their mobile number.

INDEX	DATE	STUDENT NAME	COMMENT	FOLLOW-UP?			
<input type="checkbox"/>	1	11/06/2017	[Redacted]	no-show	No	Details	Delete
<input type="checkbox"/>	2	11/06/2017	[Redacted]	Showed up *test*	No	Details	Delete

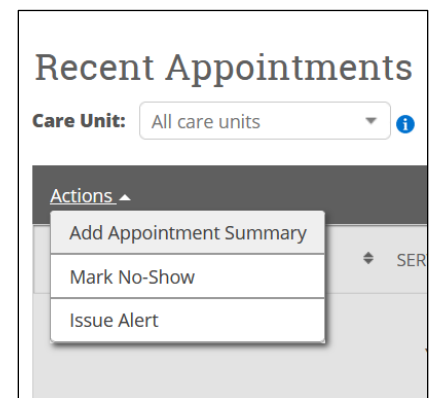
ADD SUMMARY REPORTS

The easiest and best way to add summary report is right after the appointment is concluded and the interaction is fresh in your mind:

NOTE: The appointment moves from “Upcoming Appointments” to “Recent Appointments” in Staff Homepage

- Select the student from “Recent Appointments”
- Click on Actions menu
- Select “Add Appointment Summary”

NOTE: You can “Mark No-Show” if the student failed to come in for the scheduled appointment.



Most of the information about the appointment is automatically filled in and you only need to complete the "Appointment Summary".

Include course recommendations, academic advice, referrals to other support resources on campus, action plans.

Attach any relevant files for future reference.

****IMPORTANT:** The summary should only be "factual" academic related information and free of bias, opinions, sensitive information, or personal predictions. Remember that reports/notes are accessible by students or can be subpoenaed.

THIS	INSTEAD OF THIS
Be brief and just summarize discussions that will provide adequate background for future advising sessions or interaction with faculty or support staff	Write everything down
Recommended student takes MATH 001 in Spring	Student doesn't like/want MATH 000 instructor, so I told him to take MATH 001 instead
Helped student explore other majors	Student says she wants to change major because she has heard bad things about XYZ major
Helped student consider other options	She does not look like she is going to make it in XYZ program
Student withdrew from MATH 120	Student dropped MATH 120 because of instructor
Referred student to financial aid office	Family is having financial problems due to job loss.
Referred student to Health Center	Student says he goes dizzy sometimes and cannot attend class
Referred to Disability Services	Student says she has test anxiety
Referred to Counseling Center	Student says she is having problems at home
Student reported extenuating circumstance this semester	Student's boyfriend broke up with her, so she is not in the mood to study
Student shared a personal situation that is impacting his progress this semester	Student was diagnosed with diabetes so cannot concentrate
We decided to reschedule the appointment to do more research on possible options	He looked like he just woke up, so we rescheduled the appointment