



Faculty Training Toolkit

Tools and Templates for Training Faculty Instructors,
Advisors, and Academic Leadership

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Introduction: Building a Faculty Training Strategy

For leadership teams

INTRODUCTION

Introduction to the Faculty Training Toolkit

This toolkit was developed to help Program Owners, Application Administrators, and Faculty Champions prepare for training faculty end-users to use the Navigate platform.

Moving Beyond Buy-In

Prior to doing the work of training faculty end-users, it is important to have considered 1) how your institution has facilitated faculty participation and buy-in to broader student success initiatives, and 2) your expectations for faculty utilization of the Navigate platform. Your progress-to-date in these areas should inform your approach to training faculty end-users, and will help you establish realistic expectations of faculty instructors, advisors, and academic leadership. You may find EAB's work in these areas highlighted in a [recorded webinar presentation](#) that may be found on eab.com.

Building a Faculty Training Strategy

This toolkit is intended to provide tools to leadership teams as they begin or iterate upon the ways in which they train faculty end users. Here, we incorporate the best practices and most successful approaches to training that members across the Collaborative have pursued. Namely, this toolkit offers:

- Example training plans with no more than 4 features per session
- Sessions that may be conducted in-person, in a computer lab environment
- Documentation to leave behind with trainees

Incentivizing Ongoing Faculty Engagement

Looking forward, there must be ongoing efforts to motivate and incentivize faculty end users to engage with the Navigate project and platform. While these topics are not the focus of this Faculty Training Toolkit, they are undoubtedly relevant and are areas due for further development.

Special Thanks

Two member institutions, in particular, contributed to the process of developing this faculty training toolkit: Grand View University and the University of South Carolina. As one of the key originators of the tiered training approach with faculty end users, Grand View University's conceptualization of a phased training program was invaluable in this effort. Thank you!



Training Preparation and Milestone Checklist



BEFORE TRAINING

Make sure the following exist at your institution:

- Clear university goals and expectations for platform use
- Clear university guidance on covering critical topics (risk, campaigns)
- Defined user training milestones: pre-training activities, training topics based on user role and functionality being used
- Permissions and configurations defined in training site for user roles
- Defined training session outline for user role being trained
- Overall roll-out and training timeline
- Training effectiveness assessment mechanism to collect user feedback

When planning training, consider the following:

- Define training dates, locations, attendees
- Communicate with users about training times, coordinate attendance tracking
- Confirm users have access to the site (with the appropriate roles)
- Send confirmation of access and pre-learning activities to complete in the platform in advance of training activities, if applicable

DURING TRAINING

- Utilize training session outline to ensure that you thoughtfully cover all of the relevant functionality in the platform for each session
- Share university goals and expectations for platform use
- Share resources outlining where users can go with questions about Navigate, permission and configurations, training support, and technical questions
- Share training assessment to ensure effectiveness

AFTER TRAINING

- Create opportunities for users to follow up to discuss questions, collect feedback, share updates with Training Team
- Review training assessment feedback and continue to review and improve training resources and approach based on feedback
- Communicate regularly with SSC Strategic Leader and Leadership Team about adoption, utilization, and ongoing user needs

Know Your Elevator Pitch

Every organization knows what they do, and some organizations know how they do it, but few organizations know why they do what they do or how to communicate their vision to others. The “why” is important because a belief and a vision will rally campus the way a product alone cannot. Use this worksheet to clearly articulate the unique student success vision you hope to enact through your partnership with Navigate for use in conversations and communications.

Watch Simon Sinek’s Ted Talk on “How great leaders inspire action”



http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action

Develop a Navigate Value Statement, Customized to Your Faculty & Student Success Goals

Four Elements of a Good Pitch

Provide Some (Not All) Context: Explain the challenges that spurred the technology investment, either specific to the college or across the industry (e.g., declining retention or graduation rates)

Articulate Strengths of Platform: Clearly explain the value that EAB brings to your school, including improving key outcomes, supporting advisors, providing data, etc.

Highlight Goals of the Initiative: Clearly explain how the partnership with EAB will help resolve or improve the central challenges you first articulated (e.g., by driving early registration)

End with How Faculty Can Help: End with an answer to the unspoken question, *What’s in it for me?* Let faculty know what changes they can expect to happen in their day-to-day work

Real Examples of Navigate Value Statements

“We joined the Student Success Collaborative because we want to...”

Transform Lives

“Empower the people we have to improve their processes and transform the lives of our students”

Move the Dial

“Improve graduation rates: 24% is unacceptable, 80% is achievable, and anything less is irresponsible”

Enhance the Student Experience

“Create a student experience that results in higher graduation rates”

Deliver a Social Good

“Increase graduation rates and reduce our achievement gap”

Change Campus Culture

“Positively and proactively identify and support students to improve our service”

Ensure Everybody Wins

“Promote satisfied students, timely completers, and successful alumni!”

Source: Simon Sinek, TEDxPuget Sound, 2009
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action/transcript

Setting Expectations for Platform Use



Conversations with Leadership

When training new users in the platform, it's important to outline clear goals and expectations for the way that Navigate should be used within the context of their role, and across the academic year based on the information that is most critical to inform their work, or contribute to the work of others.

Questions and Considerations to Guide Conversation

1. How frequently should faculty instructors, advisors, and/or academic leadership be utilizing the platform?
2. What specific functionality should we direct faculty users to be utilizing?
3. What changes in existing platforms or workflow will result from being trained in using Navigate?
4. Who is best positioned to articulate these expectations faculty end users? How will this person or group communicate expectations?

Example User Goals and Expectations:

- Submit progress reports for all students twice a semester, upon receiving a request to do so via email
- When a student expresses a concern or needs assistance outside of your area, issue an alert to prompt the relevant office(s) to work with the student
- Track attendance in Navigate for courses you teach with at least 50% freshmen
- Review a student's profile prior to each scheduled meeting
- Use the platform to log all appointments, advising reports, and interactions
 - Add advising reports and notes no later than the end of each calendar week
- Collect and share success stories and best practices with other platform users
- _____
- _____
- _____
- _____
- _____

Create a Training Schedule

EXAMPLE



Grand View University's Phased Training Schedule



Guide to selecting the right training session(s):

- **Quick-start Training:** For staff members who don't provide direct services to current students on a regular basis. This will include most staff from marketing, maintenance, IT, advancement, bookstore/campus services, human resources, admissions, wellness, and health services. Once you attend Quick-start, your SSC training is complete.
- **Basic Training:** For all full-time and part-time faculty (adjunct instructors), adjunct advisors, and staff who provide direct services to students on a regular basis (this likely includes all administrative assistants.) Adjunct instructors will have completed training after the Basic session but have the option for attending more training if desired (see below)
- **Intermediate Training:** full-time faculty, adjunct advisors, and staff who provide direct services to students on a regular basis. Adjunct instructors are welcome if they want to use more SSC features, but it is not required. Participants complete Basic Training before doing Intermediate Training.

Note: If you have multiple roles, for instance if you are in a staff role where you don't provide direct service to students, and you also are an adjunct instructor – go to the more advanced level of training.

DATE	TIME	TYPE	TOPICS	SESSION LEADER	LOCATION	SEATS
Wednesday, August 23	1-2 2:15-3:15 3:30-4:30	Basic	Introduction to SSC and goals FERPA Student Overview & Student Progress tabs Communication/Student messaging Issue an Alert & Progress Reports Setting up availability & calendar sync			
Thursday, August 24	2:25-3:25 3:35-4:35	Basic	See above			
Tuesday, August 29	3-4	Basic	See above			
Thursday, August 31	Noon-1	Basic	See above			
Tuesday, September 5	3:30-4:30 4:45-5:25	Basic	See above			
Saturday, September 9	9-10	Basic	See above			
Monday, September 11	3:30-4:30 p.m.	Basic	See above			
Saturday, October 21	9-10 a.m.	Basic	See above			
Tuesday, October 24	4:45-5:25	Basic	See above			
Wednesday, September 6	3-3:30 3:40-4:10	Quick-start	Introduction to SSC and goals Student information page Issue an alert			

Create a Training Schedule

EXAMPLE



Grand View University's Phased Training Schedule, Continued

DATE	TIME	TYPE	TOPICS	SESSION LEADER	LOCATION	SEATS
Tuesday, September 12	8:50-9:20 9:30-10	Quick-start	See above			
Thursday, September 7	2:15-3:45	Intermediate	Notes and Advising Summaries Appointment campaigns "Schedule Advising Appt" feature Advisor Development on above			
Friday, September 8	2-3:30	Intermediate	See above			
Wednesday, September 13	3:30-5	Intermediate	See above			
Monday, September 18	3-4:30	Intermediate	See above			
Tuesday, September 19	11-12:30 2:30-4:00	Intermediate	See above			

Create a Training Plan

SAMPLE



Sample "Quick Start" Training Plan

Section	Timing	Key Topics	Instructional Approach, Activities
1		Overview of EAB, SSC, and Goals for Faculty Use	Presentation of "Introducing Navigate" handout, and how this technology supports larger student success goals (i.e. your "elevator pitch").
2		Your Professor Home Page	Orient faculty to what they will see on their home page, offering a brief explanation of terms that may be new or unfamiliar (e.g. "progress report"). Use the "Your Professor Homepage" handout for reference.
3		Learning More About Your Students	Review the key features of the Student Profile Page that are available to your faculty. Focus on those features that provide the most value to faculty (e.g. what clubs or athletic teams a student participates in, viewing interactions with other offices on the history tab, etc.), similar to the examples provided in the "Learning More About Your Students" handout.
4		Supporting Students of Concern	<p>Articulate the purpose of a Progress Report vs. an Alert at your institution</p> <p>For each alert reason, share the support provided to a student and the follow-up a professor can expect to receive (use the "Supporting Students of Concern" handout)</p> <p>Review the multiple paths for:</p> <ul style="list-style-type: none">- Issuing a Progress Report- Issuing an "ad hoc" Alert



Exercises for Exploring Key Areas of the SSC—Campus Platform

Setting Up Your Availability

- 1. Add availability:** As a new user, the first thing you need to do is set up availability in Navigate so that students can schedule appointments to see you. Typically, you offer time for scheduled appointments from 10:30am to 12:30pm on Tuesday, Wednesday, and Thursday and from 3:00pm to 4:00pm on Monday. You also offer drop-in hours from 2:00pm to 5:00pm on Wednesday and Thursday.
 - From the Staff Home page, navigate to the “My Availability” tab.
 - Click on “Add Time” and add the availability as mentioned above. Specify the location where you will offer these hours (e.g., Academic Success Center, Your Office) and specify that you want this availability to stay on your calendar for just the current semester. Make sure to use the last field at the bottom of the window to add all student services that you want to offer, so students can sign up for specific services.
- 2. Edit Availability:** You decide to add another 3 hours of drop-in availability in the afternoon on Tuesday as the end of the semester nears.
 - Click “Edit” beside your existing availability for drop-in advising and revise it to include Tuesday.
- 3. Copy Availability:** You want to offer another hour for scheduled appointments from 3:00pm to 4:00pm on Friday.
 - Since it is very similar, select your Monday availability and click “Copy time.” Switch the day to Friday.
- 4. Delete Availability:** A meeting for the Student Support Committee you sit on has just moved to 3:00pm on Mondays and student demand is typically pretty low on Mondays anyway.
 - Select your Monday availability and click “Delete Time” to remove it.
- 5. Setting Up Availability for a Campaign:** You’ve just launched a campaign and want to make sure there is dedicated time for targeted students to make appointments with you.
 - Add two hours of campaign availability whenever you want. The campaign will only run for the next month, so limit the duration to one month from today.



Introduction to Navigate

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

LEVEL

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

1

Introducing Navigate

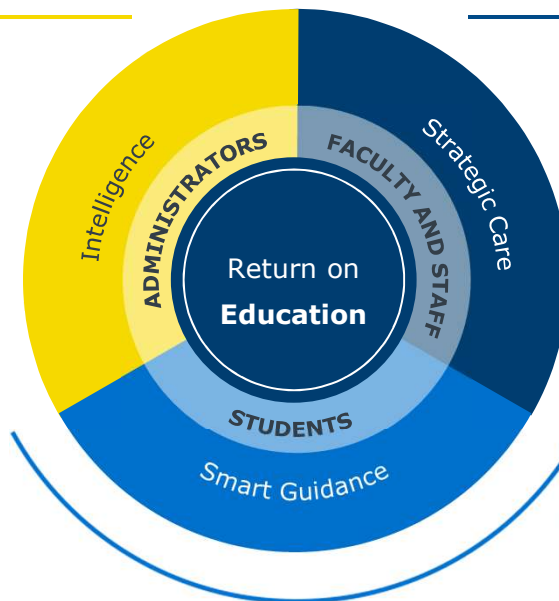
Introducing EAB's Student Success Management System (SSMS)

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

How It Works

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

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



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

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



Intelligence
For Administrators

Unlocking the power of SSC's data analytics

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



Strategic Care
for Faculty and Staff

Creating a connected and coordinated support network for all students

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



Smart Guidance*
for Students

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

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

*Optional note if the school does not have Smart Guidance

Your Professor Home Page

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

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

Professor Home

Class Listing

CLASS NAME	TIME	ROOM	
(PHIL-8710) SEMINAR IN BIOETHICS	MWF 8:00a-9:00a	Classroom 1	Assignments Progress Reports

Students In My Classes

INDEX	STUDENT NAME	CATEGORY	COURSE(S)
1	Aavang, Marnie	Gymnastics, Rock Climbing Club, Women's Basketball	PHIL-8710-08
2	Arrington, Azura		PHIL-8710-08
3	Celadon, Janeth		PHIL-8710-08
4	Jollie, Kelton	Debate team	PHIL-8710-08

Students In My Classes

INDEX	STUDENT NAME	CATEGORY	COURSE(S)
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4	Jollie, Kelton	Debate team	PHIL-8710-08

Actions

- I want to...
- Issue an Alert
- Create a New Student

Quick Links

- Take me to...
- Schedule a General Event
- Record My Class Attendance
- Record All Class Attendance
- Manage Assignments

Take me to...

- Schedule a General Event
- Record My Class Attendance
- Record All Class Attendance
- Manage Assignments
- School Information
- Download Center for Reports

Progress Reports

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

Class Listing

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

Students in My Classes

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

My Assigned Students

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

Actions Menu

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

Quick Links

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

*Optional data sets subject to member availability and formatting.

Learning More About Your Students

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

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

The screenshot displays the Navigate Student Profile for Panchali Aarhus. The interface includes a top navigation bar with the 'NAVIGATE' logo and user information (Whitehurst Un., Fall Semester 2016). A left sidebar contains various icons for navigation. The main content area is divided into several tabs: Overview, Success Progress, History, Class Info, Major Explorer, Path, Academic Plan, and More. The Overview tab is active, showing key statistics: Course Grade (2), Reselected Courses (0), Withdrawn Courses (0), Missed Success Markers (0), and Cumulative GPA (3.00). Below these are metrics for Total Credits Earned (38.00) and Credit Completion % (93%). The student's major is Pre-Psychology, and their support level is Moderate. A list of advisors and tutors is provided, including Caroline Romanoff, Tyler Dillman, Ashley Liberio, Shelagh Mollohan, Elizabeth Yackley, Jol Hayes, Brittany Whittington, Miami Advisor, Addy Advisor, and Seawolf Advisor. The 'Goals & Interests' section shows no favorite majors, subjects, fields, or activities. The 'Categories' section lists Drama Club. The 'Tags' section includes Attended Impact, Attended Orientation, JamesTag1, SEAN NEW TAGGERSON, TAG SPEED TEST, and test tag. The 'Enrollment Status' and 'Enrollment Goal' are also visible. On the right side, there are sections for Staff Alerts, Active Appt. Campaigns, Links, Student Info, and Your Success Team.

Key Features

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

*Optional data sets subject to member availability and formatting.



Communicating and Meeting with Students

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

LEVEL

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

2

Searching for Students

Identifying Students through Common Characteristics with Advanced Search

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



Student Information

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



Term Data

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



Enrollment History

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



Course Data

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



Performance Data

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



Success Indicators

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



Area of Study

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



Assigned To

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

Saved Searches

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

Saved Searches allows users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike [Watch Lists](#), which save a static list of the same students, a Saved Search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters

Watch Lists

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

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

*Optional data sets subject to member availability and formatting.

Communicating with Students

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

The Navigate platform provides both **email** and **text** messaging for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, it allows for a quick and easy way to communicate with more than one student at once.

Students In My Classes

	CATEGORY	COURSE(S)
	Gymnastics, Rock Climbing Club, Women's Basketball	PHIL-8710-08
		PHIL-8710-08
		PHIL-8710-08
	Debate team	PHIL-8710-08

SEND A MESSAGE TO 4 PEOPLE

Send E-mail | Send Text

To: Marnie Aavang, Azura Arrington, Janeth Celadon, Kelton Jollie

Subject:

Message:

Add Attachment:

Select file to attach

Send Additional E-mail Notifications To:

Cancel | Send Message

You can send emails or texts to one or more students from your professor homepage, the student profile, or the advanced search. Most "Actions" menus throughout the platform allow for sending emails or texts. See below for screenshots of each of these locations.

Email

Within an email, you can include the following information:

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

Text

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

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

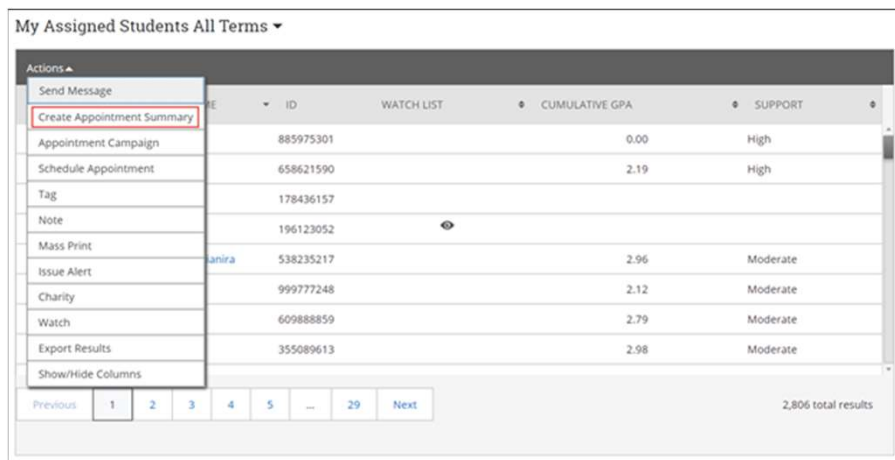
*Optional data sets subject to member availability and formatting.

Documenting Meetings with Students

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

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

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

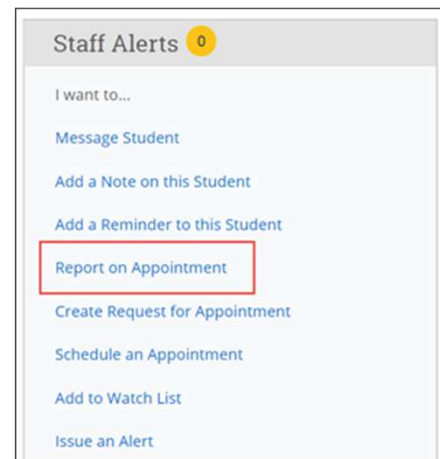


On your Staff homepage, under the “Students” tab, find the specific student in your “My Assigned Students” section, or click the drop down to find the student from one of your saved Lists. From this section, you can click on a student and select “Create Appointment Summary” from the Actions drop down.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

You can also create an ad-hoc Appointment Summary Report from a student’s profile page. Navigate to that specific student’s profile and click “Report on Appointment” from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Where can I access this documentation in the future?

All Appointment Summary Reports you filed can be found in several areas of the platform – your staff home page, the individual student’s profile page, or Reports.



*Optional data sets subject to member availability and formatting.



Scheduling Meetings with Students

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

LEVEL

3

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

*Please contact your Strategic Leader for appropriate documentation

Setting Your Availability to Meet with Students

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

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

The screenshot shows the EAB Navigate interface. The 'Staff Home' tab is selected, and the 'My Availability' sub-tab is active. The 'Available Times' table is visible, and the 'ADD AVAILABILITY' dialog box is open.

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION
<input type="radio"/>	Mon, Tue, Wed	8:00a-2:15p	Forever	Academic Advising Center TLS TEST

The 'ADD AVAILABILITY' dialog box contains the following fields:

- When are you available to meet?** (Days of week: Mon, Tue, Wed, Thu, Fri, Sat, Sun)
- From** (8:00am) **To** (5:00pm)
- How long is this availability active?** (Please select a duration)
- What type of availability is this?** (Appointment, Drop-ins, Campaigns)
- Care Unit** (Please select a care unit)
- Location** (Please select a location)
- Services** (Please select services)
- Special Instructions for Student** (Rich text editor)
- Buttons:** Cancel, Save

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

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

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

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

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

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

Click the **Save** button.

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

*Optional data sets subject to member availability and formatting.

Scheduling Appointments with Students

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

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

Launching an Appointment Campaign

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

Define the Campaign

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

Campaign Name: Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student.

Care Unit: Select the Care Unit the Appointment Campaign will be associated with

Location: Select the location of where the appointment(s) will be held.

Service: Select the Student Service that will be associated with the campaign

Course or Reason: Add the reason or associated course for the campaign here. This will only appear if the Service is tied to a course

Begin and End Date: These are the dates that you want students to start and stop making appointments for the campaign.

Appointment Limit: This will determine how many appointments you wish for the student to schedule during the campaign.

Appointment Length: This is where you define exactly how long the appointment will be. Durations begin at a 5 minute length and will be determined by your configuration.

Slots per Time: Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.

Add Students to Campaign

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.

Add Staff to Campaign

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

Compose Your Message

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

Fields used in the message composition are:

Email Subject: The topic will be the subject of the email going to the student.

Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.

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

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



Strategic Presentations & Workshops

For faculty advisors and instructional faculty and/or graduate assistants who want to use Navigate strategically

LEVEL

4

- Developing Strategic Appointment Campaigns*
- Hardwiring Best Practice Research with Navigate*

*The content of these sessions should be tailored specifically for your audience. Please reach out to your Strategic Leader for support in planning for advanced training sessions.



Training for Academic Leadership

Navigate Analytics for Deans & Department Chairs



- Searching for Student Cohorts
- Assessing the Impact of Your Student Success Initiatives

Searching for Student Cohorts

Identifying Students through Common Characteristics with Advanced Search

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



Student Information

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



Term Data

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



Enrollment History

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



Course Data

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



Performance Data

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



Success Indicators

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



Area of Study

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



Assigned To

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

Saved Searches

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

Saved Searches allows users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike [Watch Lists](#), which save a static list of the same students, a Saved Search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters

Watch Lists

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

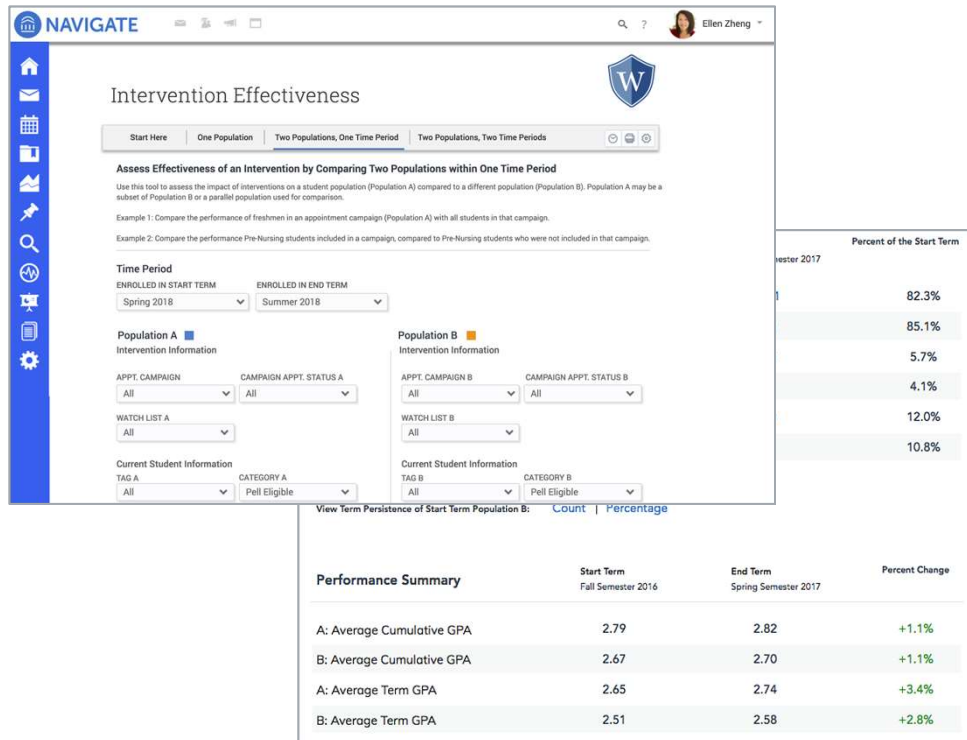
A Watch List is a static list of students by student ID. You can use Watch Lists in a variety of ways, from maintaining a list of students to track over time in Intervention Effectiveness or offline, to sending messages or appointment campaigns directly from the Watch List.

*Optional data sets subject to member availability and formatting.

Assessing the Impact of Your Student Success Initiatives

Analytical Tools Assess the Impact of Interventions on Defined Student Cohorts

Built to be a **retrospective** tool for learning about the outcomes of interventions and initiatives you have already completed, or of which you have completed a phase, Intervention Effectiveness allows you to **analyze** and **compare** the progress and performance of **student cohorts** over time to assess the impact of interventions within and beyond the Navigate platform.



One Population, One Time Period

Create a “watchlist” of students marked as at-risk via progress report campaigns and evaluate their persistence and GPA outcomes

15 to Finish Campaigns – determine the average credits earned and attempted by your selected population the term before the intervention, the term of the intervention, and the term afterward

Two Populations, One Time Period

Evaluate the persistence outcomes of students who were marked as at-risk, one group of whom attended a campaign appointment, and the other group who did not attend a campaign appointment

Persistence by Campaign Appointment Attendance – determine whether students who completed a campaign appointment registered for the next term at a higher rate than students sent the campaign who did not schedule an appointment

Two Populations, Two Time Periods

Evaluate the persistence outcomes to the following term of TRIO students marked as at-risk in Fall 2016 compared to TRIO students marked as at-risk in Fall 2017

Change in GPA for Freshman English Majors due to Supplemental Instruction – compare outcomes for a group of students to a historical population you believe to be comparable by examining GPA trends for two groups of students across the selected time periods

*Optional data sets subject to member availability and formatting.



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