



BRADLEY
University



NAVIGATE

Faculty & Staff User Guide

Remember: All information you enter into Navigate becomes a part of students' official academic record.
Students have the legal right to review their entire academic record.

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We have tried to make using this guide as easy as possible, linking to other pages when topics are related. Navigate has a lot of tools that are connected to one another, and many of those tools use language that relies on understanding how different language is used across the platform. Throughout this document, text in red font (except for headings) is a hyperlink to another page in the document that provides more information about that term and/or tool. Text in bold font reflects terms or words you will see in Navigate to help you move throughout the system.

Any system technical support should be directed to your area liaison for Navigate, then to the Service Desk for necessary additional support. [See the Bradley University Navigate website for more information.](#)

Frequently Asked Questions

How does this guide vary from the Help Center in Navigate?

EAB provides general insights into many features in their Help Center, accessible through Navigate. Some features may not be included with Bradley University's partnership with EAB, and other features may be configured to be unique to Bradley University. This guide reflects the practices and configurations set for Bradley University. You can access the Help Center by logging into Navigate, clicking the ? icon near the top right corner, selecting **Help Center & Support Links**, then selecting **Help Center**.

1. [How do I set my availability?](#)
2. [How do I set up a campaign?](#)
3. [How do I cancel or reschedule an appointment?](#)
4. [How do students schedule appointments?](#)
5. [How do I do an Advanced Search?](#)
6. [How do I add Appointment Summaries?](#)
7. [How do I request EAB Access? \(link to web form\)](#)
8. [How do I sync my Google \(FSMail\) Calendar to EAB?](#)
9. [What are Categories & Tags and how are they added?](#)
10. [What should I name my Appointment Campaign?](#)

A special FAQ for Calendars can be found [here](#). Please check this for common issues related to appointment scheduling, calendar sync, and availability.

Understanding Recommended Support Level

What is a Predictive Model?

A predictive model takes into consideration all the variables in a particular data set in order to make informed predictions about what might happen in the future. EAB's Student Success Predictive Model (SSPM) ingests data that is widely available across our entire membership in order to capture as much information as possible about a student's academic ability, performance, and preparation to determine their likelihood of successfully achieving a particular outcome—**graduation** (ever, in 4 years, in 6 years) or persistence (to the next term or the next fall term).

Why Use a Predictive Model?

We believe in using predictive models to support both individual student coaching and broader population health management initiatives. The benefits of predictive modeling can be distilled into three primary buckets:

- Visibility – Uncover Hidden Student Risk
 - Identify how risk is distributed across your institution
 - Surface hidden risk that would not otherwise be obvious
- Early Intervention – Act Early, Avoid Later Problems
 - Allow early risk prediction based on Day 1 factors
 - Flag students showing signs of being off track for their major
- Triage – Prioritize High Risk Students
 - Evaluate how students in a specific group or cohort compare in terms of risk distribution
 - Prioritize students for outreach or intervention

The ultimate goal in using a predictive model is to provide early, general guidance for assessment and intervention. EAB's SSPM works in conjunction with other key features in the Navigate platform (such as the Advanced Search, Major Explorer, Population Health Dashboard, and Predictive Influencers) in order to help you: 1) employ targeted outreach campaigns to monitor and track risk at the institution-level, and 2) better understand individual student risk and better inform one-on-one student conversations.

How Does EAB's Predictive Model Work?

The SSPM incorporates a variety of data points, around 40+ predictive features to generate its predictions. As our Data Science team created your model, they evaluated many different data points for their predictive quality. Some of these data points are available directly in your student information system, others are derived by our Data Science team using proprietary methods. The model training process uses both variable data points, such as academic progress and performance metrics, as well as static factors, such as demographic indicators and pre-enrollment data. These data points have different importance in the model depending on their evaluated predictive power, and the weight of a given factor can change over the course of a student's time at the institution. Features can range from pre-enrollment data (high school GPA, standardized test scores), to demographic data (gender, first generation status), to academic data (attempted credits, GPA trends, DFW grade counts). Some institutions also opt to include custom data, such as financial aid or engagement data, in the model, provided the points meet the coverage requirements.

Once the model has been trained using your institution's historical data, it is applied to your current student population. During this application process, the SSPM assigns a 'success score' (a numerical value between 0.0 and 1.0) to each student indicating their likelihood to achieve the configured success outcome, given their unique characteristics and how similar students performed in the past. Once given this score, students are sorted into three buckets: high risk, moderate risk, and low risk levels. The definition as to how a numeric success score is translated into a risk level is customized on a school-by-school basis (**institutions can also change the word "risk" to use any other term, Bradley uses the phrase "Recommended Support Level"**). Once scored, the appropriate risk level will appear on the 30 Second Gut Check on the Overview tab of the student's profile.

Source: "Intelligence - Predictive Model." Help Center, EAB, May 2019, support.gradesfirst.com/hc/en-us/articles/360014057494-Intelligence-Predictive-Model.

Recommended Support Level - Frequently Asked Questions

Is the predictive model based on machine learning?

Our SSPM training process is best described as 'supervised machine learning'—the model is given a set of input data and outcomes along with a set of variables and determines (without human input) which variables and weightings are most useful in predicting the outcome.

Our freshmen students are very different from our upperclassmen, and we believe that they will respond to factors differently. How does the model take these differences into account?

We agree! To account for distinct student populations, our model is a set of sub models based on credit accumulation. Each model includes different predictors and weights those predictors differently based on the predictive power of each feature for the particular credit band. This allows the predictive features to fluctuate in weighting based on how far a student is in their academic career (i.e., predictions for first year students will be more highly weighted towards pre-enrollment data, while predictions for 5th year students will be more highly weighted towards credit accumulation).

How are the data points included in the model selected?

Our team has developed a comprehensive set of predictors, and which of these predictors end up making it into a given school's model is determined by three things:

1. Data coverage—to ensure that the student data used to train the model is truly representative of the overall population, we will only include a data point in the model training process if the breadth and depth of coverage meets our standard requirements
2. Our optimization process—we may exclude a predictor if it does not increase the model's overall accuracy or demonstrate significant predictive power
3. Member request—we may exclude a predictor based on member requests

We will always recommend erring on being more inclusive rather than exclusive of the data included in the model training set—the more robust the data used to train the model, the more accurate your model will be.

How do you determine the thresholds used for each risk level?

We determine threshold recommendations by looking at the distribution of numeric success scores across the historical and current student population for each school. As a reminder, each student is assigned a success score on a scale of 0-1 indicating the likelihood that a student will achieve the evaluated success outcome. The best way to think about what these success scores represent is not necessarily 'a student with a .7 score has a 70% chance of graduating', but rather '7 out of 10 students with this score will go on to graduate'. We can use this logic when we think about setting thresholds—what do we want a given risk level to represent? Schools typically approach this decision in one of two ways.

- Mimicking historical performance: we determine what a risk level should represent in terms of the success likelihood of that population (ex: low risk students historically graduate at a rate of X%, moderate risk students graduate at a rate of Y%, and high risk students graduate at a rate of Z%).
- Managing staff capacity: we determine how many students should be classified in each level based on an institution's resources or strategic plan.

Why would a student have "Unknown" risk?

The only reasons a student would be classified as having unknown risk would be 1) we have intentionally omitted their program of study from scoring (like a grad program), 2) the member has chosen to not score students until they had attempted a certain number of credits, 3) the student is inactive, or 4) the student is missing critical data points that keeps the model from being able to score them.

Source: "Intelligence - Predictive Model." Help Center, EAB, May 2019, support.gradesfirst.com/hc/en-us/articles/360014057494-Intelligence-Predictive-Model.

Naming Conventions for **Watch Lists** and **Campaigns**

What

When creating an **Appointment Campaign** or saving a **Watch List**, Navigate will prompt you to define a name.

Why

Following standard naming convention policies is imperative to maintain the efficiency and integrity of the Navigate platform. While *most* other users will not see your **Watch Lists**, certain tools for tracking outreach effectiveness *will* display the titles of all **Watch Lists** created across campus. **Campaign** names will always appear on **Advising Summary Reports** (visible to students), on the student profile, and in the same outreach effectiveness tools that **Watch List** names will appear.

Finally, clearly naming your **Watch Lists** and **Campaigns** makes it easier for Navigate support to help you if you have any problems with either feature of the Navigate system.

How

1. When asked to define a name for a **Watch List**, please apply the following name conventions:

Term_WL_Your Initials_Description

*An example of this for a **Watch List** created by Reggie Star for students flagged **At-Risk** in spring 2019 is below:*

19SP_WL_RS_At-Risk

2. When asked to define a name for a **Campaign**, please apply the following name conventions:

Term_Your Initials_Campaign_Description

*An example of this for a **Campaign** created by Reggie Star for advising appointments taking place in spring 2019 is below:*

19SP_RS_Fall_Advising

Please contact the Academic Success Center or your unit's leadership with any questions about these naming conventions. We appreciate your commitment to these naming conventions.

Remember: *All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record.*

Categories & Tags

What

All students in Navigate have at least two **Categories** associated with them. **Categories** consist of important student data/characteristics that automatically import into Navigate with each overnight import. **Tags** are additional important student characteristics that function similarly to **Categories**; however, they are applied manually and must be managed by an individual with access to do so in Navigate. Both **Categories** and **Tags** provide parameters on which **Advanced Searches** can be built. **Categories** and **Tags** also appear on the **Overview** tab of each student's profile. To request addition of a **Category** or **Tag**, please contact the Academic Success Center.

Important Categories

It is impossible to list all **Categories** that exist within Navigate in this guide; however, some key **Categories** that are used to identify specific populations for messaging and/or support outreach are below.

Entry Year—the year of the student's first term

Entry Term—the semester (fall/spring) for the student's entry year cohort

*Note: In **Advanced Search**, use **Entry Term** and **Entry Year** together to identify students from a specific cohort*

Minor—any minor(s) declared by the student will appear in **Categories**

Holds—a variety of registration holds are listed under **Categories**. For example, you can identify students who have an Admissions Hold, Advising Hold, or Controllers Office Hold.

*Tip: when using **Advanced Search**, simply type "Hold" into the **Categories** field to display a list of all **Categories** that contain the word "Hold."*

Current Type—this corresponds with the Student Type in AcInquire (New, Continuing, 2-Year Transfer, 4-Year Transfer, etc.)

Entered As—like **Current Type**; however, this refers to the type a student had at entry

Full-Time, Part-Time—course load for which students claimed their classes in the given term

Undergraduate, Graduate—if the student is coded as an undergraduate or graduate student

Applied for Graduation—students who have completed their application for graduation

First Generation—if the student has indicated that they are a first-generation student

International—if the student is an international student

Out-of-State—if the student's home residence is outside of Illinois

Residential—if the student lives on-campus

Important Tags

Exit—student has completed an Exit Interview and plans on/has left the university

Honors Program—student is part of the Honors Program

Leave of Absence—student is on leave of absence

Various athletics affiliations, indicated different Law or Health professions tracks, etc.

Navigate Tools for the Professor

As a professor/instructor at Bradley University, you will find a number of features available in Navigate, our early alert/student success management platform, to be quite helpful. Key features that will help you in this role to promote student success are outlined below. Each heading is inked to a document that goes into more detail on a specific feature.

Issue an Alert

Issuing an Alert is an efficient way to communicate to the appropriate university faculty/staff about common concerns that impact our students. It is important to review the information page on Alerts so that you understand what Additional Comments are appropriate to include within the Alert.

Record Class Attendance

The Attendance tool in Navigate allows you to document attendance issues (e.g., absences and tardiness) within the platform. Tracking attendance in Navigate allows anyone with access to each specific student's profile to see where attendance issues are occurring. This is very useful in instances when an Alert is issued in one class reporting multiple missed classes for the person responding to that alert to see how widespread any attendance issues might be. It also provides you with a quick way to record, track, and export to Excel your class attendance.

Schedule Class Meetings

Navigate offers two ways for you to schedule meetings with students. You can use the system to schedule one-on-one or group meetings with students, or you can use the system to email all students who meet certain criteria (e.g., are enrolled in one or all of your classes) and request that they use the system to schedule a meeting.

Send Messages to Your Students

Navigate makes it simple to communicate with one or more students in your classes by email. It is important to note that these messages, like most information entered into Navigate, are stored in the platform and are visible to administrators and, in some cases, advisors who have access to the specific student's records. These messages are always visible to you from the Conversations tab.

Create a Note

You can add a note on an interaction with a student for you to review/remind yourself of information you may have discussed with the student. Notes can be shared with students through Navigate. Please note that students will not be notified automatically if a note is added.

Progress Reports

You may receive requests to submit progress reports on students in your classes. These are requested for specific student populations and/or for certain courses designated as high-DFW (disproportionate number of students earn Ds, Fs, or Ws) or predictive gateway courses.

Writing Center Reports

Reports from every tutoring appointment in the Writing Center can be found in Navigate.

Navigate Tools for the **Advisor**

As an advisor at Bradley University, you will find a number of features available in Navigate, our early alert/student success management platform, to be quite helpful. Key features that will help you in this role to promote student success are outlined below. Each heading is inked to a document that goes into more detail on a specific feature.

Alerts

Issuing an Alert is an efficient way to communicate to the appropriate university faculty/staff about common concerns that impact our students. It is important to review the information page on Alerts so that you understand what Additional Comments are appropriate to include within the Alert.

Student Profile

The student profile in Navigate offers a robust and dynamic view of several critical factors related to your advisees' success. Key academic points, recommended support level, prior advising appointment reports, notes from other colleagues, Alerts & Cases related to your student, tutoring visits, Writing Center reports, and Tags & Categories that provide useful insight into each student's unique experience at Bradley University.

Schedule Meetings/Appointments

Navigate offers two ways for you to schedule meetings with students. You can use the system to schedule one-on-one or group meetings with students, or you can use the system to email all students who meet certain criteria (e.g., are enrolled in one or all of your classes) and request that they use the system to schedule a meeting. A powerful appointment reporting tool is also part of the Navigate platform and helps advisors share advising information with students and others with access to the student profile.

Send Messages to Your Students

Navigate makes it simple to communicate with one or more students in your classes by email. It is important to note that these messages, like most information entered into Navigate, are stored in the platform and are visible to administrators and, in some cases, advisors who have access to the specific student's records. These messages are always visible to you from the Conversations tab.

Create a Note

You can add a note on an interaction with a student for you to review/remind yourself of information you may have discussed with the student. Notes can be shared with students through Navigate. Please note that students will not be notified automatically if a note is added.

Scheduling Meetings in Navigate

What

Navigate offers two ways for you to schedule meetings with students. You can use the system to schedule one-on-one or group meetings with students, or you can use the system to email all students who meet certain criteria (e.g., are enrolled in one or all of your classes) and request that they use the system to schedule a meeting. The latter scenario is considered an **Appointment Campaign**.

Before you get started, please note that scheduling appointments in Navigate requires established **Availability** first. Please visit the **Availability Guide** document for instructions before proceeding.

Why

Appointments scheduled in Navigate include automatic reminder emails and text messages (to the student) in advance of the appointment. You are also given a report form associated with that appointment if you would like to keep record of your discussion. Please note that these reports are always visible to students when they login to Navigate. Finally, it is very easy to download a report on all of the appointments you have within a given timeframe in the event you need to report on various types of appointments.

How

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.
2. Open a student profile by searching for the student in the top right corner or selecting them from the list of students assigned to you.
3. Click **Schedule an Appointment** from the sidebar under the heading **Staff Alerts**. This will open the Appointment Screen.
4. Select the **Care Unit**, **Location**, and **Service** from the side filters. These must match your **Availability**. If the service requires a course or your appointment is course-related, select the **Course** as well.
5. Select the organizer for the appointment. This will most likely be you. Once you select an organizer, a grid showing available dates and times will appear. The grid will show all possible appointments based on the availabilities for the **Service** in the week that corresponds to the date selected in the **Select a Date** calendar in the filters section. [Click here for more on Services](#).
6. Once you have set the appointment details, click **Save Appointment** to create the appointment. It will be added to the organizer's calendar and a notice will be sent to the student's email from Navigate.

See the next page to learn how students schedule meetings in Navigate.

How Students Schedule Meetings

What

One of the most powerful features of Navigate is the ability to allow students to schedule meetings with you on their own, without needing to contact you or anyone in your office, and without the back-and-forth attempting to identify a time during which you are mutually available. You will need to have **Availability** created within Navigate in order for students to locate and book time with you. We also strongly recommend syncing your calendar to avoid being double-booked.

Why

Outsourcing appointment scheduling to Navigate can save a substantial amount of time for faculty and staff. It also helps students find out who can help them and when without making multiple calls around campus. Perhaps most important to advisors, though, is that Navigate will provide you with tools for sharing **Appointment Summary Reports** with students and other colleagues who may work with the student, as well as provide a very efficient tool for reporting on your appointments (type, quantity, frequency, etc) with just a few clicks.

How

1. Students login to Navigate the same way faculty and staff do – bradley.edu/navigate



2. From the **Student Home**, students select the blue **Get Assistance** button under the Bradley University logo.
3. Students will be shown a series of dropdown menus to locate the best individual with whom to meet. Selections in these dropdowns must align with faculty/staff **Availability** and **Locations** in order to display the correct individual. An example of selections for students to meet with their advisor (requires advisor to have the **Meet with My Advisor** service in their availability) is below:

Schedule Appointment

What type of appointment would you like to schedule?

Academic Advising, Coaching or Clas... ▾

What type of meeting do you want to schedule?

Advising in My Major/Minor ▾

In which department/area?

Meet with My Advisor ▾

Next ►

4. The next screens depend on what **Service(s)** were selected by faculty/staff when setting up **Availability**.
 - a. If the assigned advisor(s) does not have availability in Navigate, students will be shown an error message and will be unable to book an appointment through Navigate with their assigned advisor.
 - b. If availability does exist, students will be asked to choose a **Location**. This must align with the **Location** set in the faculty/staff **Availability**. This will then provide a list of faculty/staff who are available to offer the selected **Service** in the selected **Location** (see below). Remember, in most cases, faculty/staff create **Availability** in the **Faculty/Staff Office Location**.

Schedule Appointment

What location do you prefer?
 Academic Success Center

Who would you like to meet with? You may choose more than one person.
 Any Staff
If you don't have a preference, just click Next.

◀ Back Next ▶

5. Students are then shown a calendar with available times highlighted in blue. They will select a day and time, then click **Next**.
6. A confirmation screen appears for the student to review all details. Some faculty/staff request that students add **Comments** to provide insight into the purpose of the meeting. Students must click **Confirm Appointment** in order for the appointment to book. An automatic email will be delivered to the selected faculty/staff member confirming the appointment was booked. As long as the student left **Send me an Email** checked, they will also receive this email. Navigate also allows students to have the system send confirmation and reminder **Text Messages**. See below.

Note: If nobody receives a confirmation email, the appointment was not booked.

Schedule Appointment

Your appointment has not been scheduled yet. Please review and click Confirm Appointment to complete.

Appointment Details

Who: Morgan Harrell with Susan Rapp **When:** Friday, July 26
 12:30pm - 1:00pm

Why: Academic Exploration Program **Where:** Academic Success Center

Additional Details
 Office Location: LIB 320

Is there anything specific you would like to discuss with Susan?
 Comments for your staff...

Send Me an Email
 Send Me a Text
 Please provide your mobile number
 7736750292

◀ Back Confirm Appointment

Note: If students were included in an **Appointment Campaign**, they will receive an email with a link to book the appointment and will skip to step 5 above.

To see an example of how the Academic Exploration Program provides scheduling instructions to their students, [see this page](#).

Canceling or Rescheduling Meetings

What

Meetings scheduled in Navigate may need to be cancelled or rescheduled, but this must be done through Navigate. Follow the steps below for the process you need to complete.

How to Cancel a Meeting

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.
2. Make sure you are on your **Staff Home** screen. If the header toward the top left reads **Professor Home**, simply click that, then select **Staff Home**.
3. Select the meeting.
 - a. If the appointment is visible under the **Upcoming Appointments** box on the right side of the screen, simply click the **Service** for the meeting (not the student name).
 - b. If the appointment is not visible there, click the **Upcoming Appointments** tab directly under **Staff Home**, then click **Details** at the end of the row that corresponds with the meeting you want to cancel.
4. In the lower left corner of the pop-up box, select **Cancel Appointment**.
5. Decide on the cancellation terms – everything entered here will be sent in the cancellation confirmation emailed received by all appointment participants.
 - a. Select for whom the appointment should be cancelled. If the entire appointment is to be cancelled, select **Entire Appointment**.
 - b. Select a **Reason** for the cancellation from the next dropdown.
 - c. Add any applicable **Comments**.
6. Select **Mark as Cancelled**.

How to Reschedule a Meeting

1. Complete steps 1-3 above.
2. In the lower left corner of the pop-up box, select **Cancel Appointment**.
3. Select **edit** in brackets to the right of **Appointment Details**.
4. **Uncheck the box(es)** that are checked for the current appointment time.
5. Use the **Select a Date** calendar and checkboxes on the week display to select new appointment day/time.
6. Select Save Appointment.

Creating **Availability** for Appointments

What

Creating **Availability** opens your calendar for specific periods where you can schedule appointments with students and students can schedule appointments with you. Appointments scheduled in Navigate can check your Google Calendar for availability and place appointments scheduled with you through Navigate on your Google Calendar with **Calendar Sync**. One of the most common mistakes made when creating availability in Navigate is when users *also* block that time out on their Google Calendar. If your Google Calendar is synced with Navigate, you want to be sure that if you put that time on your Google Calendar, you mark it as "Free." Click here for more information.

Why

Availability is required in order to use appointment scheduling features in Navigate.

How

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.
2. Make sure the top of your page reads **Staff Home**. If it says **Professor Home**, simply click on that text and select **Staff Home** to load your **Staff Home** page.
3. Open the **Actions** menu on the **My Availability tab** and select **Add Time**. The Add Availability window will open. Select the days of week, time period, and duration of your availability.

*NOTE: If you want to establish different types of **Availability** for different days or times, you will need to create more than one block of **Availability**. To do so, simply finish these instructions, then repeat them.*

4. Select your Availability type(s). You can choose more than one at a time, e.g. you can set availability for both Drop-In and Appointments at the same time. **Campaign** availability only works with the **Appointment Campaign** feature.
5. Now select your **Care Unit** from the dropdown. In most cases, this will be **Academic Advising, Coaching or Class Meetings**.
6. Select your **Location** from the dropdown. In most cases, this will be **Faculty/Advisor Office** (you will include specific office location in step 8).
7. Select your **Services** for which you will be available. In order to schedule advising appointments with students assigned to you as their advisor, you need to select **Meet with My Advisor**. If you want to allow students to schedule regular meetings with you as their professor/instructor, select **Meet with Professor/Instructor**.

*NOTE: There are several more types of **Services** listed. Click here to view the **Services Guide**.*

8. Include **Special Instructions**. These should include your specific office location and any other messages you want to have sent to students in all appointment confirmation messages.
9. Indicate the maximum number of students you want to be able to schedule during this block of **Availability**.
10. Click **Save**.

Appointment Services

What

When creating **Availability** for students to schedule appointments—whether through **Campaigns** or their own appointment scheduling interface, it is necessary for you to have selected specific **Services** that reflect the type of meeting you are available to have with students.

Why

When creating **Availability**, you must select at least one **Service** in order to enable appointment scheduling features in Navigate.

How

1. When creating **Availability**, you will be prompted to select **Services**. Click in the field that reads **Please select services** to see a dropdown list of all available **Services**.
 - a. For advising appointments with your assigned advisee(s), always select **Meet with My Advisor**. This makes appointment scheduling for students very simple as it only displays their assigned advisor when selecting this option.
 - b. Each **undergraduate department** is listed in this dropdown. Please only select your department name if you would like to be available to students *outside* your department who may want to discuss major/minor options within your department.
 - c. **Meet with Professor/Instructor** will display your name among a list of other faculty who have made themselves available for appointments with students enrolled in your classes for class requirements or other types of meetings related to classes.
 - d. **Academic Coaching** is an option that is available for students who may wish to schedule an appointment with someone to discuss study strategies, time management skills, or other topics related to general academic success. *This option is generally selected only by individuals whose title or job description includes "academic coaching" such as staff in the Academic Success Center, the Academic Coach in the Nursing Department, or the Undergraduate Student Advisor & Coordinator in the Caterpillar College of Engineering & Technology.*
 - e. **Changes to Schedule, Degree Planning, and Form Signature** may be selected, but students never see these as options for scheduling appointments. Selecting these options allows you define more specific activities done in an appointment within the **Appointment Summary Report**.
2. Click **Save** to finish creating your **Availability**.

IMPORTANT: Your **Service(s)** must match across all appointment scheduling tools in order for you to appear as an available "advisor" for those appointments.

Appointment Summary Reports

What

Appointment Summary Reports allow you to document information pertaining to a specific student appointment, whether the appointment was scheduled, a walk-in, or the student was a no-show. Access to student summary reports may be limited to your specific Care Unit or based on your user role permissions.

How

1. Following any type of Advising interaction, you may choose to create a report to document the interaction. *Please note: **Appointment Summary Reports** are always visible to students and anyone else who has access to the student's profile.*
2. There are two methods of creating an **Appointment Summary Report**. The method you choose will depend on whether your appointment was scheduled in advance through Navigate or if your appointment was not scheduled through Navigate. It is important that you follow the appropriate instructions below in order to prevent creating the appearance of a duplicate appointment.
 - A. For appointments scheduled through Navigate ([click here to learn about scheduling](#)):
 - i. From your **Staff Home** screen, you will see all **Recent Appointments** (those appointments where the start time has already passed, if even by one second). Select the check box next to the appointment for which you would like to create a **Summary Report**.
 - ii. After selecting the appointment, click **Actions** above that table, then select **Add Appointment Summary**.
 2. *Note: You can also select **Mark No-Show** to indicate the student did not attend the scheduled appointment. By selecting this, no other summary information will be requested.*
 - B. For appointments that were not scheduled through Navigate:
 - i. Visit the profile page for the student.
 - ii. Under **Current Alerts** on the right side of the screen, select "**Report on Appointment**"
3. Select your **Care Unit**. This will usually be **Academic Advising, Coaching or Class Meetings** for most appointments. Selecting your **Care Unit** populates the remaining selections for your **Appointment Summary. Location** and **Service** must always be selected. [For information about Services](#), please view the **Appointment Services** guide.

Note: The more details you populate, the greater your ability to report on various types of appointments at a more granular level.
4. When finished, click **Save this Report**. The report will be visible under the **History** tab on student profiles.

Launching an **Appointment Campaign**

What

Using the **Appointment Campaign** feature enables you to send an invitation to a group of students to schedule an appointment with you within a timeframe that aligns with your **Availability**. **Availability** must be created before you can launch an **Appointment Campaign**. [Click here for the Availability Guide](#).

Why

An **Appointment Campaign** can save you time in managing multiple calendars/appointments and allow you to easily identify those students who have not yet scheduled an appointment you have requested.

How

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.
2. Make sure the top of your page reads **Staff Home**. If it says **Professor Home**, simply click on that text and select **Staff Home** to load your **Staff Home** page.
3. Click **Appointment Campaigns** in the **Quick Links** menu. Then, click **Appointment Campaign** under **Actions**.
4. Set the criteria for your **Appointment Campaign**. The **reason/location/date range** must align with **Campaign Availability** for the advisor(s) that are going to be included in the campaign. When you are finished defining Campaign criteria, click "Next."
 - a. Campaign Name is visible to you and other users who can view campaigns in Navigate. It will also display on students' **Appointment Report Form** (even if you don't write one). [Please click here to view the Campaign Naming Policy](#).
 - b. Appointment Limit refers to the maximum number of appointments any one student can schedule within this campaign.
 - c. Slots Per Time refers to the number of students you want to permit to sign up within the same time block. If you only do one-on-one appointments, this is "1."
5. Add students to your Campaign using **Advanced Search**. [For help, see the Advanced Search Guide](#).
6. You will need to select yourself as staff for the campaign. You may also have the option to select additional staff to make them available for appointments based on the campaign. Click "Next."
7. Compose the message the students in your campaign will see. You can also add additional **Instructions** to the scheduling page students see after clicking the link in your email. Click "Next."
8. Confirm & Send. You can always add more students later and only send the invitation email to the new students added to the campaign.

Advising Appointment Workflow

<p>Availability Click here for information on how to create Availability</p>
<p>Sync your FSMail calendar to Navigate to prevent double-booking</p>
<p>Build Availability Blocks in Navigate in order to allow students to schedule appointments with you through Navigate</p>
<p>Create a Campaign to Invite Students to Schedule an Appointment Click here for a guide on Campaigns</p>
<p>Define your Campaign terms Select recipients of your Campaign Add advisors to your Campaign Compose your message Confirm and send your invitation</p>
<p>Advising Appointments – Before the Appointment</p>
<p>Review your student's dashboard on their profile screen. This provides a quick overview of Ds/Fs/Ws, Credit Completion %, Cumulative GPA, and Total Credits earned</p>
<p>Review your student's Success Progress (this shows Predicted Influencers [items affecting the student's Recommended Support Level, Success Markers, and GPA & Credit Trends by Term)</p>
<p>Review any History (including Alerts, Cases, Notes, Advising or Academic Support Reports, and visits to select support units, attendance at workshops, and/or review sessions)</p>
<p>Review the student's academic history by selecting the Class Info tab</p>
<p>Advising Appointments – During the Appointment</p>
<p>Discuss any outstanding concerns (Alerts or Cases) with the student and ensure they've contacted the appropriate office</p>
<p>Reflect on and share your insights from your review of the student's History and Class Info – consider how they are doing overall and what this may mean for their graduation timeline and future goals</p>
<p>Advising Appointments – After the Appointment</p>
<p>Submit your Advising Report* on your appointment with the student (click here to learn about reports)</p>
<p>If this was a pre-scheduled appointment, do this from the Staff Home screen. If this was a drop-in appointment, do this from the student's profile screen</p>
<p>Advising Reports should include a summary of your discussion including: classes student plans on taking and requirements the classes count toward, future goals/majors or minors of interest, recommended referrals or follow-up steps for the student to complete – this is for students <i>and</i> other advisors</p>
<p>Create any Alerts or Reminders you might need to follow-up or refer the student for additional support as necessary</p>
<p>If student was a no-show, mark that in the system to document the missed appointment</p>

Remember: All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record. ***Advising Reports are always visible to students.**

Syncing with Google Calendar

Calendar sync allows you to have Navigate look at your Google Calendar (associated with your FSMail account) in addition to any availability you have created in Navigate to avoid double-booking with meetings that were not scheduled in Navigate.

Calendar sync also allows Navigate to automatically place any appointments scheduled in Navigate directly onto your Google Calendar.

Google (FSMail) Calendar Sync Instructions (One-Time Setup for Each User)

While Google Calendar sync should only need to be done one time for each user, occasionally, that connection can break. The only way you will know if that connection breaks is if you find Navigate appointments not being sent to your Google Calendar or if you find that you have been double-booked. If this happens, a ticket should be submitted to EAB to repair your connection.

1. Click the Calendar icon in the red menu on the left side of the screen.
2. Click the **Subscriptions** tab under the **My Calendar** heading.
3. Click **Setup Calendar Integration**.
4. Click the **Google Integration** tab.
5. Follow the instructions to complete setup within the application.



You will be able to set up **Free-Busy** or **Two-Way** calendar sync. We always recommend setting up Two-Way calendar sync so that appointments scheduled in Navigate make it onto your Google Calendar. With Free-Busy sync, Navigate will look at your Google Calendar before allowing a student to schedule an appointment; however, appointments scheduled in Navigate will not appear on your Google Calendar.

[Click here to see a Calendar Sync FAQ.](#)

The **Advanced Search Tool**

What

The **Advanced Search** function allows you to create unique lists of students based on the layering of various search parameters. 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. The **Advanced Search** functionality is not meant to be a historical Search. Unlike other parts of the platform, changing the **Global Term Selector** does not impact the results of the **Advanced Search** except in the case of **Classification** and **Category** in the results returned page. Most search filters create AND statements. As you build a search by laying on various filters within or across drawers, the query will identify students that satisfy all the listed requirements.

How

1. Within certain tools in Navigate, you may be prompted to generate a list of students using **Advanced Search**. In the **Advanced Search** standalone tool, you must check the small box at the top right corner of the dark gray bar that reads **Show Advanced Filters** in order to enable all filters. *Please note: not all users will have access to **Advanced Search**.*
2. When conducting an **Advanced Search**, you will be given up to 8 **Filter Drawers** to expand or limit your search criteria. A description of each is below.
 - A. **Student Information:** Use this group of filters to search for students by personal identifying information, such as name, student ID, **category***, **tag**, or transfer status.
 - B. **Enrollment History:** Create logic statements to search for students by their enrollment status in a variety of terms.
 - C. **Area of Study:** Combine elements of this filter to search for students based on areas of study, including college affiliation, degree, concentration, or major.
 - D. **Performance Data:** Search using these filters to segment student groups by GPA, credits earned, and hours attempted.
 - E. **Term Data:** Select conditions within this group of filters to run a search for students using information associated with a specific term.
 - F. **Course Data:** Utilize this group of filters to query students based on courses, section, and status.
 - G. **Assigned To:** Enter information into fields in this bucket to pull lists of students assigned to specific advisors, tutors, coaches, or team members.
 - H. **Success Indicators:** Run a search using these filters to identify students based on predicted **Recommended Support Level** or success marker completion status.
3. Once you have selected the search fields, click **Search** at the bottom of the screen.
4. From here, you may complete a variety of **Actions** with this list or **Save** your search.

*Click here for more information about **Categories & Tags**

Creating a **Watch List**

What

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, to send messages, or create **Appointment Campaigns** directly from the **Watch List**.

How

There are several ways to create a **Watch List**. It is important to note that, while the students who you add to your **Watch List** will not be visible to other users, the *name* of your **Watch List** will display in a tool called **Intervention Effectiveness** (this is a new tool that is not yet available to most users). As such, it is important to abide by the **Naming Conventions** determined for Bradley University.

[Click here to see that guide.](#)

1. From **Advanced Search** results
 - A. Select the students from your search results by checking the box next to the students' names
 - B. Click **Actions** in the dark grey bar above the search results, and select **Watch**.
[Click here to see information about Advanced Search.](#)
1. Uploaded using a CSV file containing student ID numbers
 - A. Click the **Lists & Searches** icon in the red menu on the left (this displays as a bookmark icon with a + sign next to it).
 - B. In the **Actions** menu under **Watch Lists**, select **Upload Watch List**
 - C. Create a new **Watch List** or add students to an existing list
 - D. Select the file from your computer and upload it
 - E. Choose the column that represents the student ID in your file, then finish the import
2. From a student profile
 - A. In Navigate, open a student's profile
 - B. On the right side of the profile, under **Staff Alerts**, select **Add to Watch List**
 - C. Select the list or create a new list to add the student

Taking Attendance in Navigate

What

The Attendance tool in Navigate allows you to document attendance issues (e.g., absences and tardiness) within the platform.

Why

Tracking attendance in Navigate allows anyone with access to each specific student's profile to see where attendance issues are occurring. This is very useful in instances when an Alert is issued in one class reporting multiple missed classes for the person responding to that alert to see how widespread any attendance issues might be. It also provides you with a quick way to record, track, and export to Excel your class attendance.

How

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password
2. Make sure the top of your page reads **Professor Home**. If it says **Staff Home**, simply click on that text and select **Professor Home** to load your **Professor Home** page.
3. Under **Quick Links** on the right, select **Record My Class Attendance**.
4. First select the course, then the date for taking attendance.
*Note: If your course has irregular meeting times, please still select the correct date. You will be able to enter **Ad-Hoc Attendance** after selecting the date.*
5. Mark students as **Present**, **Absent**, or **Tardy**. If you mark students either **Absent** or **Tardy**, you can also select the **Excused** radio button. The column titled **Pattern** on the right-hand side shows the pattern of attendance for this student for up to the last 5 recorded attendances for this class. You also can mark only the students who are **Absent** or **Tardy** and then use the option below the grid to mark the remaining students present.
6. After completing the grid for that course at that time, select the Save Attendance button below the grid. You may go back and edit or update absences at any time.

You may export your attendance report from Navigate to Excel by clicking **To Excel** under the course information from the **Course Attendance** screen. Although it appears, Bradley University does not use the **Census** feature, so this button should be disregarded.

Sending Email Messages

What

Navigate allows you to send email messages directly to students' Bradley email accounts from what appears to be your Bradley email account. Communicating with students through the platform creates records of that communication which can be accessible by other staff or faculty with appropriate permissions to view other users' **Conversations**.

Why

This tool is a quick way to identify groups of or individual students to whom you want to send a message that is also recorded in both your and the students' Navigate pages. In most cases, faculty/staff will send messages to students from **Advanced Search** results, from their table of assigned students on the **Staff Home** screen, or from the table of students enrolled in their classes on the **Professor Home** screen. **All recipients of this message are BCCd, meaning they will not see who else is receiving the same email.**

How

1. Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.
2. From any of the tables referenced above, click **Send Message** from the **Actions** menu.
*For help with **Advanced Search**, please visit the **Advanced Search Guide**.*
3. Create a **Subject** and **Message** for your email.
4. Add any relevant **Attachments**.
5. **Send Additional E-mail Notifications To:** allows you to manually include a list of other recipients for this message. If you would like to receive a copy in your Bradley email account, enter your Bradley email address here.
6. Click **Send Message**.

NOTE: You can see an **archive** of all messages you have sent through Navigate by clicking the **Conversations** item in the main red menu on the left of all screens in Navigate. This appears in most browsers as an **envelope** icon.

Creating Notes

What

While the **Advising Report** is a great way of documenting interactions with students related to advising, **Notes** are generally the best way to document interactions outside of that context. **Notes** are a useful way of storing attachments on the student record and for sharing information with faculty/staff and/or students.

Why

We often have interactions regarding students that we want to make note of for future reference. In the past, faculty/staff may have written something and stored it in the student file or even stuck a sticky note as a reminder for the next time they visited that student's file.

How

Login to **Navigate** (bradley.edu/navigate) using your BU Net ID and password.

1. From any student profile, click **Add a Note on this Student** from the **Current Alerts** menu on the right side of the page.
2. Write the text of your note in the **Note (Required)** field.
3. Add any relevant **Attachments**.
4. You must select a **Note Reason**. If none of the available options are relevant to your **Note**, contact the Academic Success Center to discuss the possibility of adding an additional option.
5. Indicate to whom your **Note** will be visible by checking any of the following options:
 - a. **{Your Name} Only**—selecting only this option will make the **Note** only available to you. Please remember that any **Notes** you save, regardless of their visibility in **Navigate**, are connected to the student academic record and may be requested by the student through appropriate legal actions.
 - b. **{Student Name} Only**—selecting only this option will make the **Note** visible to the student when they login to **Navigate** (the system will not automatically alert the student that a **Note** has been added. This **Note** would also be available to view by anyone who has access to the student's profile (including you).
 - c. Both **{Your Name} Only** and **{Student Name} Only**—only you and the student would see this **Note**.
 - d. Leaving both boxes unchecked will make the **Note** visible to anyone who has access to the student's profile *except* the student.
6. Click **Save Note**.

Remember: *All information you enter into **Navigate** becomes a part of students' official academic record. Students have the legal right to review their entire academic record.*


Contacting Students Not Enrolled in Next Term

rePORTAL provides an on-demand report of undergraduate, degree-seeking students who have not applied for graduation but who are not registered for the next term. This list can be uploaded into a Watch List in Navigate so that you can more easily manage (and track the effectiveness of) your outreach to these students. Additionally, if a student has already notified us that they do not intend on returning in the next term, you can use Advanced Search in Navigate to exclude them from your outreach or identify those students.


Step 1: Generate the list in rePORTAL

- a) Login to rePORTAL by accessing reportal.bradley.edu.
Remember: this password may be different from your BU Net ID password.
- b) Open the folder entitled **Student Records - Registrar** and select the report named: **WR 266_01_01 - Student Not Enrolled for Next Term.**
- c) Select the appropriate current internal term. If you are looking for students not registered in Spring 2020, you would select 2019V (V = fall; G = spring), then click **Submit**.
- d) Be sure to save this file to a location where you can easily access it.

Step 2: Upload this file into Navigate

- a) Login to Navigate by accessing bradley.edu/navigate
- b) Click the **Lists & Searches** icon in the menu on the left: 
- c) Under **Watch Lists**, click **Actions**, and select **Upload Watch List**.
- d) Select **New Watch List** from the dropdown, and enter an appropriate name (e.g., "Students Not Registered in 20SP") and click **Confirm**.
- e) Select **Choose File**, then locate the rePORTAL file you downloaded in step 1, then click **Open** and click **Click to upload the file**.
- f) Select the column in the file that has the Student ID number (if you did not modify the file from rePORTAL, this will be "studnum"), then click **Save**.

Step 3: Use Advanced Search to take action with this list

- a) Click the **Advanced Search** icon in the menu on the left: 
- b) Click the checkbox next to **Show Advanced Filters** to expand your search functionality.
- c) Click the **Student Information** section to display **Watch List** and select the **Watch List** name you created in Step 2 to show students who appear on this Watch List.

To exclude students who have already completed an Exit Survey, click the plus sign () next to **Tag (In Any of These)** to display additional tag options. Under **Tag (In None of these)**, select **Exit**.

To display students only in specific academic programs, expand the **Area of Study** section and use college and/or major fields. Minors are populated under **Student Information** as a **Category**.

You can use the **Actions** menu to add students to appointment campaigns or send a message.

Progress Reports

A progress report is a communication tool for faculty to alert advisors, administrators, and services that support students when a student may be at-risk of not passing a particular class. These are different from **Alerts** because they are usually forms submitted that cover an entire group of students or class as opposed to individual notices. [Click here for information on how to submit a Progress Report.](#)

Why do we use progress reports?

We know that early and frequent feedback on student performance provides students with increased opportunities to change behaviors and use support services and resources. Often times, the outreach done with the results of progress reports introduces students to the support systems they need to utilize in order to make a positive impact on their academic performance.

What are the benefits of progress reports in Navigate?

Historically, progress reports would be requested through DocSoup. DocSoup forms allowed faculty to submit feedback on one student in one class at one time. Using Navigate, all students who are enrolled in your class(es) who are targeted for progress reports will appear on one screen. This tool allows faculty to highlight only those students of concern, then indicate that all others are not at risk by simply clicking one button.

Quickly submit only necessary feedback.

There are two buttons at the bottom of the page that allow faculty to submit all at-risk students as such while marking all others as not at-risk OR submit all at-risk students as such and NOT submit reports for the remaining students. The latter option allows faculty to return to the progress report and submit an at-risk designation if they collect more information later that indicates the student may be at-risk.

Please note: progress report request links will expire at a time entered by the person who requests the progress reports.

Navigate progress reports are FERPA-compliant.

Information about student risk will be available to staff in the Academic Success Center—including the Math Success Center—students' advisors, and records staff with permission to view progress reports. Students will not automatically see whether or not they have been flagged at-risk; however, they will be contacted and asked to follow certain instructions (e.g., schedule an appointment with Academic Success Center staff and/or their advisor(s) to discuss their challenges and options). Information from your progress report will be shared within that contact.

Flagging students as "at-risk" will initiate outreach to them.

When you flag a student as "at-risk," you are asked to indicate why ("reason"), what their current grade is, and any attendance information you have. You will also be provided an additional field for open comments. Using any of the pre-selected options in the **Alert** dropdown and recording other accurate information about absences and current grade is a safe way to share vital information with advisors and staff conducting outreach.

Supplement progress reports with additional relevant comments.

You may make note of any additional information you think would be important in outreach to students. Certain information about health, relationships, disabilities, etc. may have been shared with you that students otherwise may not disclose. **We ask that you exclude information about these items from progress reports.** Speculation and commentary should generally be excluded. If you have a question about whether or not something should be included in these comments, please contact the Academic Success Center.

Remember: All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record.

Submitting Progress Reports

Information about **What Progress Reports** are and **Why** we use them can be found in the **Progress Reports Overview** document.

How

1. If a **Progress Report** is requested from you on students in one of your classes, you will receive an email from the person who initiated the **Progress Report** request. This person will create a unique subject for the email; however, the email will appear within a Navigate template including the words **Student Feedback Request** in bold at the top of the email.
2. Clicking the link after the body of the email that reads **Click to Begin Entering Student Feedback** will be the fastest way to submit your **Progress Report**. Alternatively, when in Navigate, visiting your **Professor Home** page will display a yellow banner toward the top of the page that also provides a link to submit your **Progress Report**.
3. Either way, once you click a **Progress Reports** link, you will need to fill out the following fields on your students.
 - a) **At-Risk to Fail Your Class?**—Use this field to indicate whether this student is currently at-risk of failing your class. Indicating a student is **At-Risk** generates an alert to the student's advisor and adds the student to a report that will be shared with their college's associate dean.
 - b) **Alert Reasons**—This field is only used if the **At-Risk** field was selected as "Yes." If "Yes," then the faculty must select a reason.
 - c) **Absences**—The number of absences this student has accumulated thus far. Please indicate with a numerical value if you have this information.
 - d) **Current Grade**—The grade the student has earned in this course.
 - e) **Comments**—You may make note of any additional information you think is important for us to consider in outreach to students. Certain information about health, relationships, disabilities, etc. may have been shared with you that students otherwise may not disclose. We ask that you exclude information about these items from Comments. Speculation and commentary should be excluded; only document **observations of student behaviors**. Contact the Academic Success Center with questions about comments
3. Once you have filled out these fields, click EITHER:
 - a) **Submit only marked students (but I'm not done)** button if you will return to fill out more progress reports later, OR click
 - b) **Submit unmarked students as not At-Risk (I'm all done)** button. This link gives you the option to only manually mark students who are **At-Risk** and automatically mark everyone else not **At-Risk** when you click this button.

Note: **Submit unmarked students as not At-Risk (I'm all done)** is also the button you select when you are done filling out Progress Reports, even if you have marked every student individually.

Students are not notified automatically if they are flagged At-Risk in a class.

Remember: All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record.

Accessing a **Writing Center** Report

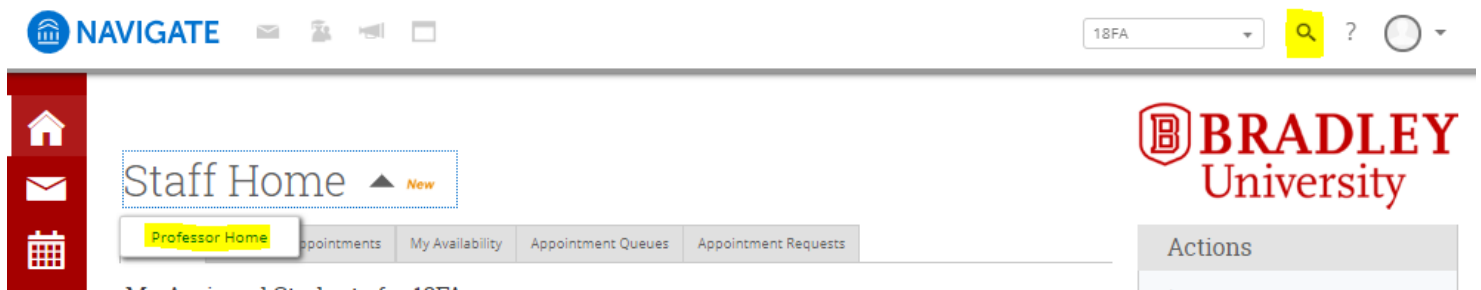
Every time a student meets with a graduate assistant in the Writing Center, a report is created that documents the topics discussed during the appointment. When a student visits the Writing Center for assistance with an assignment for a specific course, that professor/instructor will receive an email notifying them that the Writing Center Appointment report is available for them to access in Navigate.

Reviewing a Report from the Writing Center

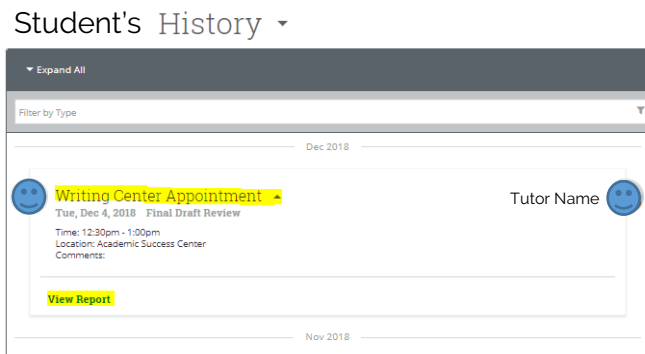
You can access these reports on-demand from any internet-connected device on or off campus.

1. Log in to Navigate (**bradley.edu/navigate**—we recommend saving this as a bookmark!).
2. Locate the student profile for the student who had the Writing Center appointment.
 - a) You may click the magnifying glass in the top right corner to search for the student by name, ID number, or email address.
 - b) Alternatively, you may click **Staff Home** to view your **Professor Home** screen to access a list of students enrolled in one of your courses this semester. You may simply click the student name on this list.

NOTE: If you have advising or administrative responsibilities, you will likely log in directly to the **Staff Home** screen. If you are an instructor/professor without additional responsibilities, you will probably log in directly to the **Professor Home** screen.



4. Click the **History** tab on the student profile.
5. Scroll down to the student history section, then click the "Writing Center Appointment" that corresponds with the date of the appointment for the report you'd like to review.
6. The information will expand, and you will be given the option to **View Report**. Click this to access the full Writing Center report for the appointment.



Alerts Overview

An alert is the preferred method for faculty & staff to report concerns about students and ensure the issue is routed to the appropriate staff or faculty member(s) to respond and/or follow-up.

Why do we use alerts?

Alerts are issued for a variety of reasons and are an efficient way for faculty and staff to communicate concerns about students that may allow for intervention that increases the likelihood of promoting student success and/or retention. There are currently 11 options to select as a **reason** for the alert:

1) Financial Concern, 2) Major Exploration, 3) Not Attending Class, 4) Exam D or F, 5) Multiple Missed Assignments, 6) High Risk of D or F in Class, 7) Classroom Participation, 8) Missed Exam or Quiz, 9) Mental Health, 10) Classroom Disruption/Behavioral and 11) Health/Medical.

Alert reasons may be added as more student support offices are added to Navigate.

How can I issue an alert?

Individuals who would like to issue an alert on a student may login to Navigate and click "Issue an Alert" from their home screen or from a student's profile screen to initiate the alert. The alert issuer will be asked to select at least one **reason** for the alert (above), associate an alert with a specific class in which the student is currently enrolled, and add additional comments* to support the intervention work.

What are the benefits of alerts in Navigate?

Navigate allows for simple notification to appropriate offices that may need to be involved to collect additional information or conduct outreach for the student. Outreach steps that are taken will be documented within the case so the alert issuer can review the progress of the case and any comments about what has been done directly from the student's profile under the "History" tab. This keeps all stakeholders and concerned parties knowledgeable about what is happening to support the student.

The system provides an opportunity for us to see alerts in the context of a broader picture of the student's academic history and performance, allowing for more appropriate and relevant outreach to the student. This makes the faculty/staff job simple when communicating concerns as it ensures the appropriate individuals are notified about the issue quickly and efficiently.

What is done with alerts & cases?

Alerts issued in Navigate create a **case** that is routed to the Academic Success Center for review. Staff in the Academic Success Center will review the alert reason(s), comments, and student's major and assign the case to the appropriate individual, indicated in the **Alert Guide**.

When a case is closed, the individual who issued the alert is notified that the case was closed via FMail and given instructions to review what steps were taken and how the case was resolved.

IMPORTANT: Adding appropriate additional comments.

You may make note of any additional information you think is important for us to consider in outreach to students. Certain information about health, relationships, disabilities, etc. may have been shared with you that students otherwise may not disclose. We ask that you exclude information about these items from alerts. Speculation and commentary should be excluded; only document **observations of student behaviors**. Contact the Academic Success Center with questions about comments.

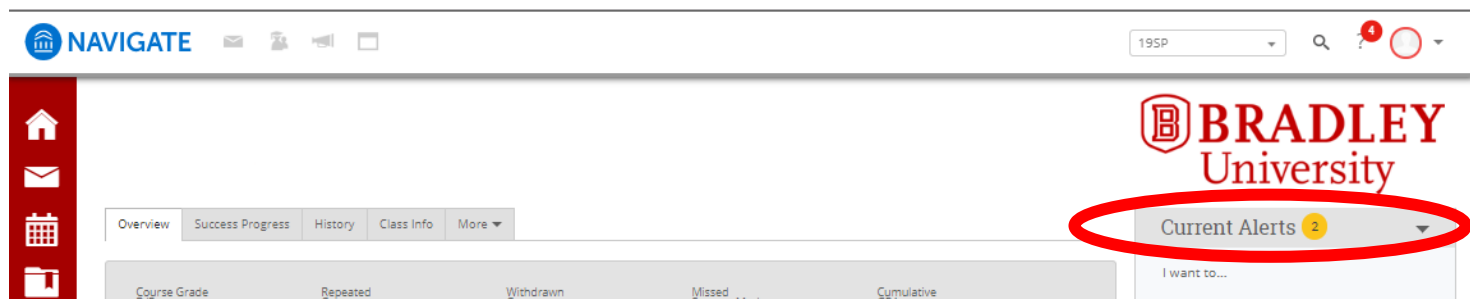
***Remember:** All information you enter into Navigate becomes a part of students' official academic record. Students have the legal right to review their entire academic record.*

What happened with my **Alert**?

Any time after you have submitted an **Alert** (including after the related **Case** has been closed), you may be curious to check the status of the **Alert** and/or view the details about what was done with your **Alert**. This guide outlines the process for viewing the details. If you have never submitted an **Alert** or if you want more basic information about **Alerts**, [See more about Alerts here](#).

Checking **Alert** Status/Details

1. Login to Navigate (bradley.edu/navigate)
2. Locate the student about whom you submitted an **Alert** by clicking the magnifying glass icon in the top right corner, then searching by BU Net ID, name, or student ID number.
3. Locate the "Current Alerts" header on the right side of the student profile page (see below).



4. If a number appears in the yellow circle, the student has an **Alert**. If no number appears, there is not an **Alert** that has been submitted. If a number does appear, click this heading, then click this heading.
5. A dropdown will appear that says "**# Alerts**" and/or "**# Open Cases**." Click the **# Alerts** text to be taken to the student's **Alerts History**.
6. Locate the **Alert** you would like to review, then click the "**Manage Case**" button on the row that corresponds with this **Alert**.

After clicking "**Manage Case**," you will see the entire documented history with this **Alert**. If you have any questions, please contact the Success Team Case Owner for the college of the student's primary major. Success Team Case Owners are highlighted in yellow on [this document](#).

Calendar Sync - Frequently Asked Questions

Note: The most common issue with scheduling appointments through Navigate is when a faculty/staff member creates availability, but the availability is not showing up for students in the Appointment Scheduler. This is usually because the faculty/staff member blocked the time out on their Google Calendar so other appointments would not be scheduled during that time. This will make the faculty/staff member appear busy during this time, so Navigate will not permit students to schedule appointments. If the faculty/staff member wants to keep the block on their Google Calendar, they can edit the event on their Google Calendar to be "Free" instead of "Busy." This way, it still shows up on their Google Calendar, but it will not prevent students from scheduling through Navigate. This is also true with all-day events; however, by default, most all-day events appear as "Free." If a faculty/staff member wants to block students from scheduling with an all-day event, they should confirm the all-day event appears as "Busy" in Google Calendar.

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When should I sync my calendar?

We recommend only syncing the calendar once. We strongly recommend not syncing your calendar on your training site, but only on your production site so that no sample appointments appear on your personal calendar.

What is Free/Busy?

These are events that have synced from your professional calendar into the Navigate platform. They will display in your Navigate calendar as either free or busy times.

What are Blocked times on my calendar?

Blocked times may appear on your calendar if you have an appointment made from a Care Unit for which you do not have the permissions to view appointments.

How many calendars can I sync with Navigate?

You can only choose one calendar to sync with Navigate. If you are trying to sync multiple calendars with Navigate, there will be errors, and it will not be successful.

Why won't certain events sync on my calendar?

There are several reasons why events do not sync on your Navigate calendar. First, a recurring event with no end-date will not sync in Navigate. Recurring events with more than 750 instances also will not sync.

What do 'Tentative' appointments on my calendar sync as on Navigate?

Tentative, busy, and away appointments all sync as 'Busy' on your Navigate calendar.

How long does it take to sync my calendar with Navigate the first time I do so?

The first time you sync your calendar with Navigate, it may take up to 10 minutes to complete the sync.

How frequently is my calendar synced with Navigate?

Appointments should be synced to and from the Navigate calendar within seconds. If you are noticing a lag in appointment syncing, contact your Application Administrator to help you troubleshoot. If you do not adjust anything yourself in your calendar or Navigate, the calendar sync will refresh on its own every 30-35 minutes.

Why can't I cancel my appointment in Navigate?

The appointment was probably created in your professional calendar. You need to edit your appointment in your professional calendar application, not in Navigate.

Why can't I cancel my appointment in my professional calendar?

The appointment was probably created in Navigate. If an appointment is created in Navigate, you must cancel it in Navigate.

Every time I create a Summary Report for a student, it automatically creates an appointment on my professional calendar. Is there a way to turn that off?

No, there is no way to change this behavior. When you create an ad-hoc summary report, the Navigate platform is automatically creating an appointment in the past based on the information you include in that summary report. The past appointment will then sync to your professional calendar. This process ensures the appointment data is accurate, even if you did not use the scheduling workflows to create that appointment.

What happens if I change my name or my email at my institution?

You will need to have your account reset. The information will need to be put into user settings before syncing the updated calendar. Talk to your institution's Application Administrator if this is your situation.

Does the Navigate calendar read or display details of my personal or professional appointments?

No. The Navigate calendar does not see details of your personal or professional appointments. It only pulls in your appointments to list time as Free/Busy to prevent scheduling appointments conflicts.

What information can be synced to my professional calendar from Navigate?

Navigate appointments synced to your professional calendar should display the type of appointment, time, and location by default. Your institution may decide to sync additional information, including student ID (in both the body and title), student name (in both the body and title), and student phone number.

Is it possible to include student email address in the synced appointment within my professional calendar?

No, it is not possible to include student emails. The only information that can sync to your professional calendar are those listed in the answer to the question above – type of appointment, time, location, student ID, student name, and student phone number.

Why is my all-day event in my professional calendar not blocking off time on my Navigate calendar?

Most all-day events default to "free" in calendars. You will need to mark those busy to avoid having those days appear available to appointments in Navigate. In the opposite case, all-day free appointments with no end day might sync as busy – should that occur, include an end date in your appointments for them to sync as free time in your Navigate platform.

What should I do if there are errors with my calendar sync integration?

If your calendar sync is experiencing issues, first try Retry Sync. Then, please contact your Application Administrator, who can troubleshoot with you and then work with our Member Support team for further help.

Do student courses or professor courses sync through Navigate?

No, courses do not sync through Navigate.