Launch Planner

CUNY Queens College

Introduction to the Launch Planner

The Launch Planner outlines the key settings your institution must decide on and configure prior to go-live, based on your implementation strategy. This document provides guidance by implementation 'block", and links out to other supplemental resources (an orange arrow calls out resources)

Communication Strategy Toolkit

The Communication Strategy Toolkit gives you guidance for thinking through and designing appropriate communication strategy for introducing Navigate to various stakeholders on your campus. It was specifically designed for the **Leadership Team**, and **Communication & Promotion Team**.

Content Development Toolkit

The Content Development Toolkit walks you through the timeline, process, and feature design to create content for students. It will help you prioritize content types and messaging most fitting for your students. It was specifically designed for the **Content Team.**

Analytics Toolkit

The Analytics toolkit covers a comprehensive overview of features and decisions associated with the Intelligence pillar. It was specifically designed for the **Analytics Team.**

Student Promotion Guide

The Student Promotion Guide provides ideas for driving adoption and utilization among students, including examples from other institutions. It was specifically designed for the **Communication & Promotion Team.**

Strategic Care Configuration Tracker

This is an optional resource that was built for the **Workflow & Training Team**. While the Implementation Planner provides configuration recommendations, you can use this document for keeping track of changes to default recommendations.

CAT User Guide

The CAT User Guide walks through how to use the Content Administration Tool to create, edit and customize content for the Navigate student app. It was specifically designed for the **Content Development Team**.

Your EAB Partners will support the implementation

Business Analyst

Is your partner for the technical implementation, including data mapping and validation process.

Launch Consultant

Is your partner for making all decisions associated with how each pillar, block and process should be rolled out.

Strategic Leader

Is your partner on high level strategic decisions that will impact success of Navigate on your Campus

Start with best practices research

- Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
- At the core of all we do
- Peer-tested best practices research
- Answers to the most pressing issues

Then hardwire those insights into your organization using our technology & services

Enrollment Management

Our **Enrollment Services** division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

Student Success

Members of the **Student Success Collaborative** use research, consulting, and an enterprise-wide student success management system to help students persist, graduate, and succeed.

Growth and Academic Operations

Our **Academic Performance Solutions** group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

1.2B+
Student interactions annually

1M+
Individuals on our student success management system

1,200+
Institutions we are proud to serve

1
Goal: Make education smarter

Unpacking Navigate

Basic and additional blocks that make up an implementation

Planning Blocks cover a basic set of activities needed to build a foundation for a successful technology implementation

General

Introduction to Navigate Technology

Coordinated Care Network

Building Your Leadership Team

Technology and Workflow Audit

Implementation Strategy

Student Population Decisions

Utilization Goal Setting

Communication Planning

Student Promotion Planning

Training Strategy Planning

Go-Live Planning

Core Blocks are basic blocks for a successful Phase I launch

Strategic Care

User Roles

Care Units

Appointment Campaigns

Smart Guidance

Intake Survey

Content

Hold Center

Major Explorer

Unpacking Navigate

Basic and additional blocks that make up an implementation

Additional Blocks are recommended for Phase I+ roll-out

Strategic Care

Additional Care Units

Progress Reports

Alerts and Cases

Enrollment Census

Attendance

Milestone Guidance

Special Population Content

Student initiated Appointment Scheduling

Student Success Network

Athletics blocks cover key features used by Athletics departments to help with success of student athletes

Study Hall

Travel Letters

Validation and Go-Live cover a checklist of items to consider just prior to rolling out Navigate

Staff Validation Exercise

Student Validation Exercise

Go-Live Support Structure

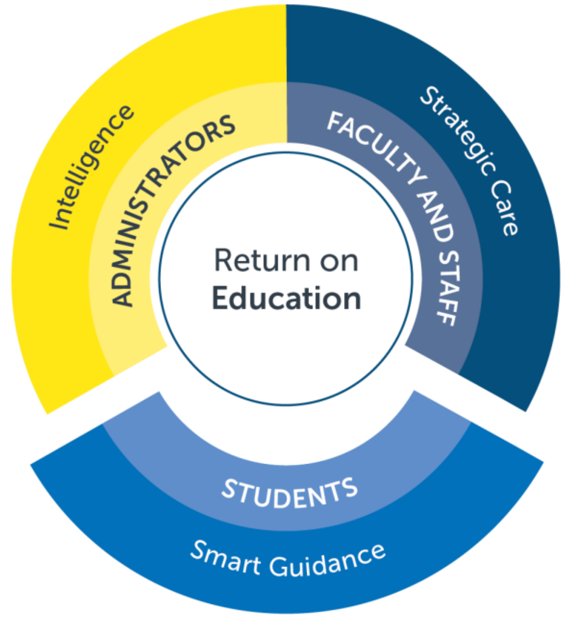
Planning Blocks

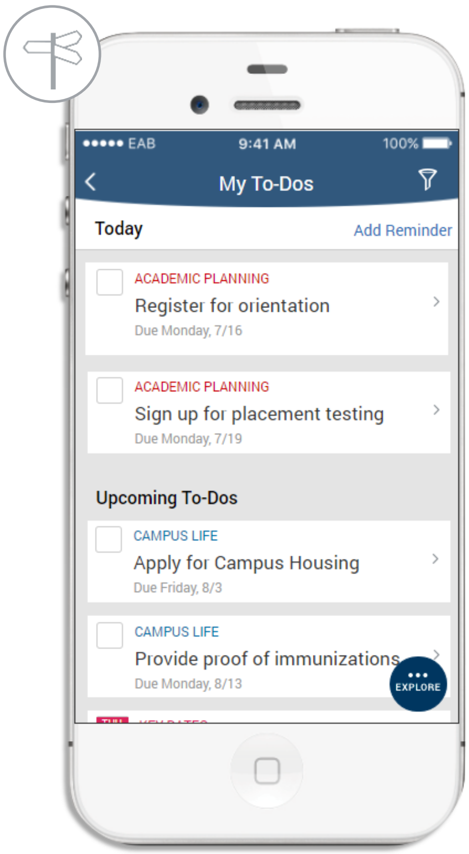
SECTION 1

- Introduction to the Navigate Technology
- Coordinated Care Network
- Building Your Leadership Team
- Technology Workflow Audit
- Implementation Strategy
- Student Population Decisions
- Utilization Goal Setting
- Campus Communication Planning
- Student Promotion Planning
- Training Strategy Planning
- Go-Live Planning

Milestone Guidance for Students

Dynamic Mobile Platform Provides Intelligent, Tailored Guidance to Help Students Succeed

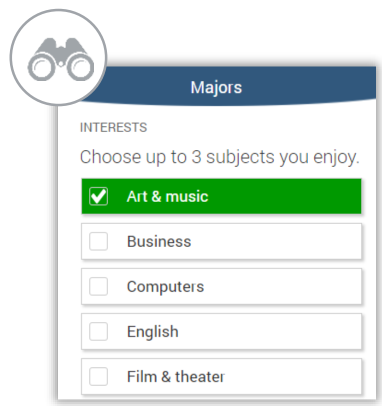


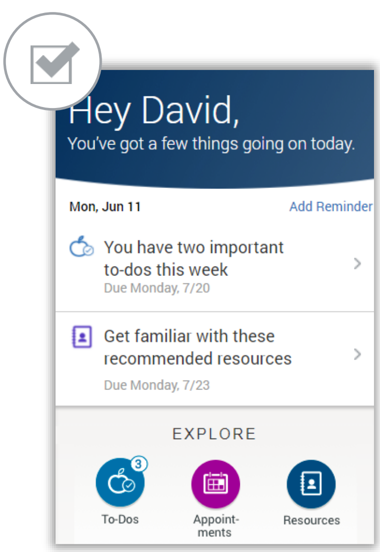


Guided Onboarding

A timeline of to-dos helps students navigate the transition to college with timely, customized support. Alert notifications remind students about important deadlines and overdue tasks.

The experience is customized based on student SIS and intake survey data; the timeline dynamically updates based on student progress and in-app activity.





College/University Milestone Guide

Post-onboarding, students can see important college milestones disaggregated into tasks and alerts to help them plan their term.

Self-service tools allow students to connect with their personal success team, schedule their week, and receive customized guidance.

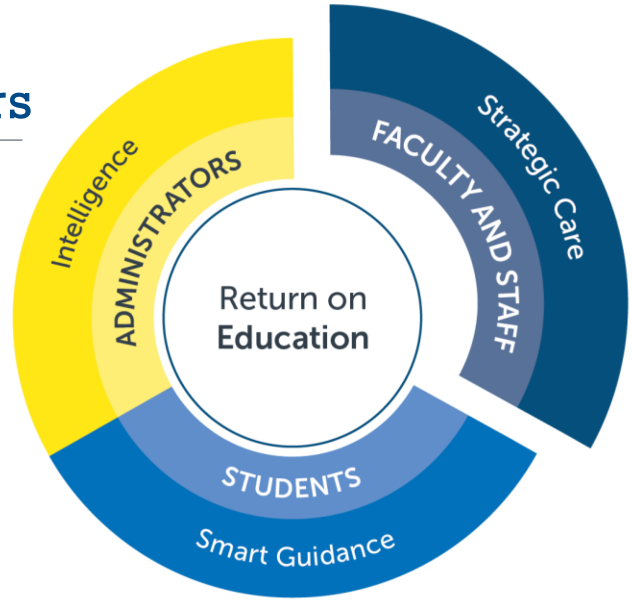
Major Selection Guidance

The Major Explorer mobile tool simplifies the major selection process, allowing students to make simpler, smarter decisions early in their college experience.

After capturing students' interests and career preferences, the Major Explorer generates a customized a list of best-fit programs and job recommendations.

Strategic Care for Faculty, Advisors

Workflow Tools Enable Targeted Interventions and a Coordinated Network of Support



Smart Student Profile

We provide a 360-degree view of the most actionable student data (academic, financial, and behavioral) to support holistic and strategic student care. The Smart Student Profile includes:

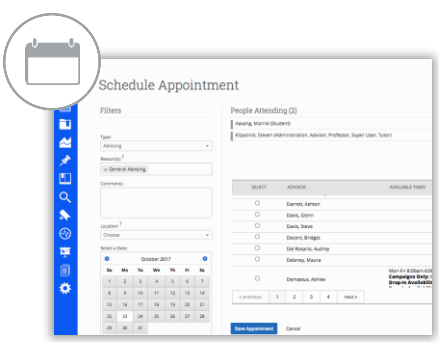
- Personal information
- Key academic indicators including predicted risk
- Unofficial transcript and class information
- GPA and credit trends by term
- Alerts and cases
- Assigned advisors and tutors
- Mobile app engagement data

Coordinated Care Network

Coordinate campus-wide student support through observational early alerts, case referrals, closed-loop reporting, and centralized interaction records like notes, documents, and customizable permissions.

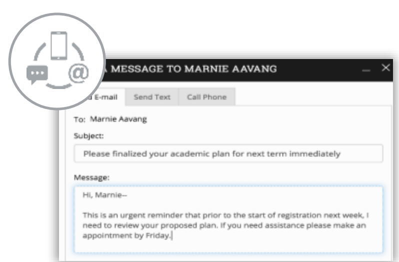
Campaign Management

Improve advisor efficiency and promote proactive advising with targeted mass outreach to students, including responsive scheduling and tools to monitor campaign results.



Appointment Scheduling

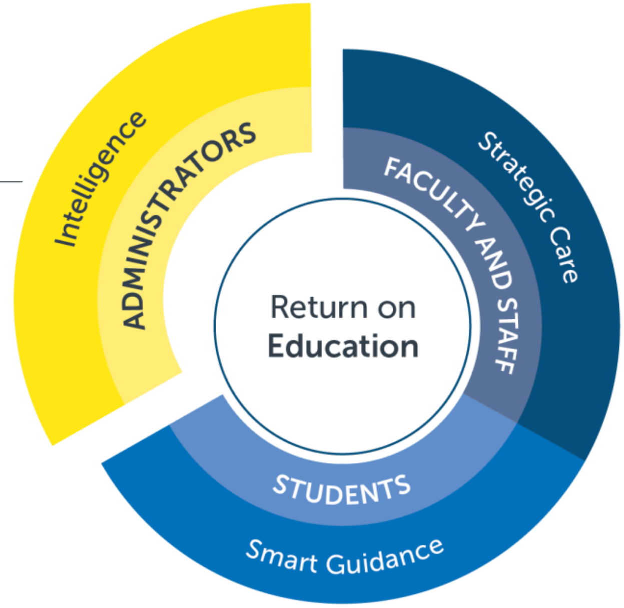
Provide faculty and staff with flexible appointment scheduling and tools to promote better planning and availability management.



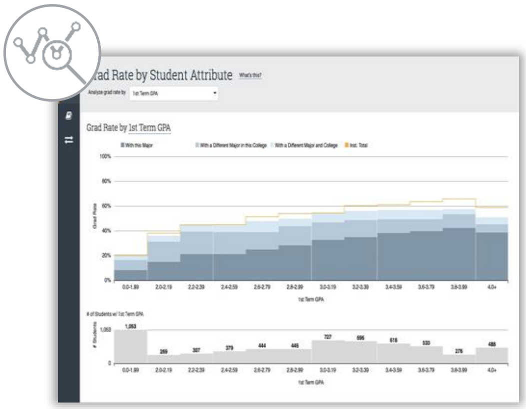
Multi-Modal Student Communications

Engage with individual and groups of students through email, text, or click-to-call directly through the platform.

Intelligence for Administrators

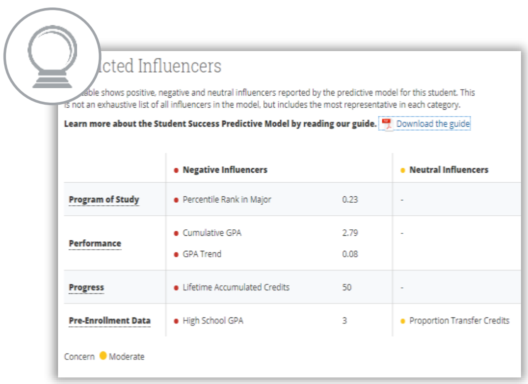


Research-Based & User-Driven Analytics Help Leaders Translate Insights Into Action



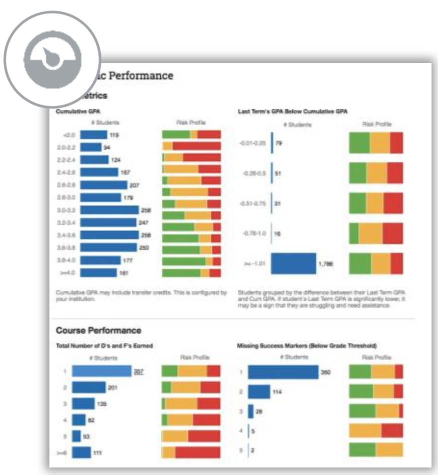
Historical Trend Analytics

Identify opportunities and evaluate patterns of student success, risk, and failure using up to 10 years of historical data unique to your institution.



Predictive Analytics

Understand both cohort-level and individual student risk to facilitate timely and strategic care across all students groups. Our **machine learning** engine ingests up to 10 years of historical data to custom configure a predictive model customized for your institution.



Population Health Analytics

Track key academic performance and progress indicators with dashboards that help you identify intervention opportunities across discrete student populations.

SSMS Activity Analytics

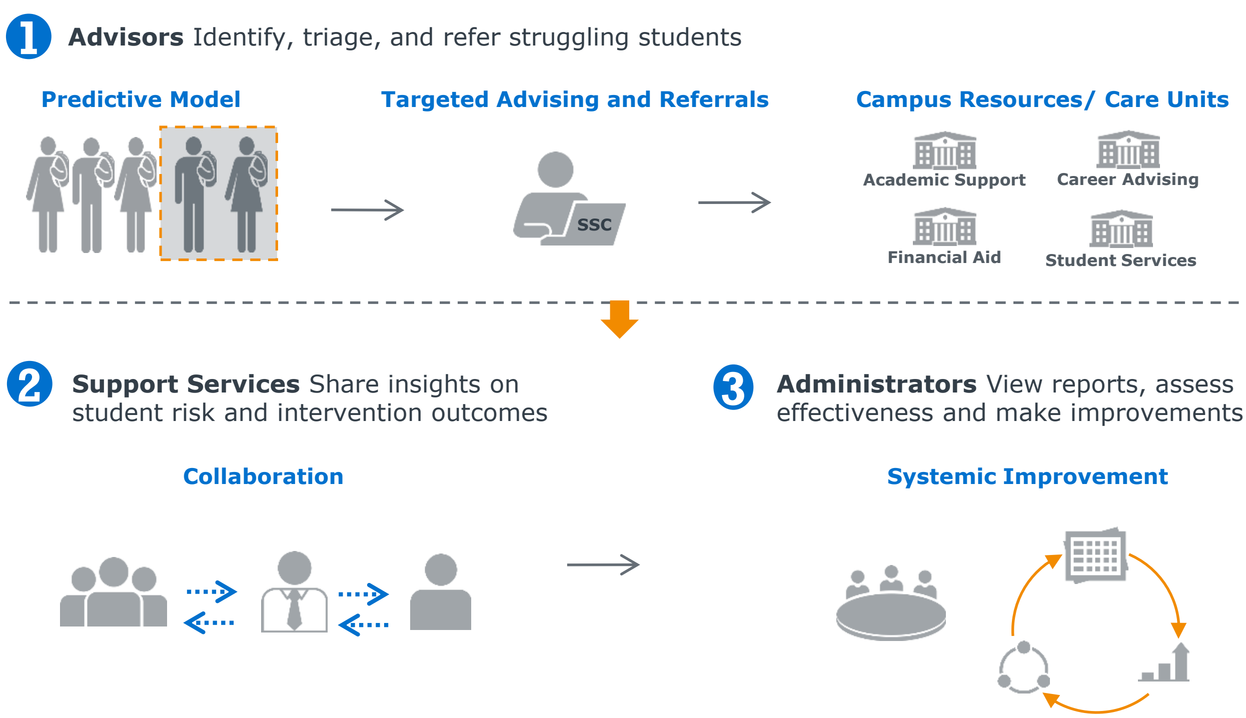
Access aggregate and line item reports on student groups, alerts, assignments, cases, appointments, attendance, and risk. Sample SSMS Activity reports include:

- Advisor Activity Reports
- Tutor Activity Reports
- Progress Reports
- Alerts Reports
- Absence and Enrollment Reports
- Assignment Reports

Introduction to the Coordinated Care Network

What is the Coordinated Care Network?

The Coordinated Care Network is a network of coordinated support providers, connected by technology and processes, to make it easier for students to navigate the system and receive holistic support.



When to Expand Your Coordinated Care Network

We recommend new members of the Collaborative begin rolling out Navigate by engaging critical platform users such as advisors and instructional faculty before engaging additional support units.

Implementing and promoting a new technology is a resource-intensive process, and we believe that staggering the roll-out of Navigate to different user groups results in a smoother, more sustainable implementation experience. Once advisors and faculty are up and running in the platform, using features like advanced search, campaign management, and progress reports, institutions can begin to engage additional stakeholders and student support units in EAB Navigate.

By expanding the number of support units using the Campus platform, members of the Collaborative will create a comprehensive network of student support units, unified through a single technology enabling them to track communication, and share critical information and records of their interactions with students.

Building Your Leadership Team

Leadership Team

Roles	Key Responsibilities
1 Program Sponsor	• Overall program and organizational champion • Ensures support and holds team accountable
2 Program Owner	• Leads overall effort to engage the users who will be using the product and maximizing value derived from the program
3 Application Administrator	• Primary owner of user activation, roles, permissions, and configurations in Navigate • Triage end user support issues and requests
4 Content Administrator	• Publishes and maintains in-app content in Navigate Student through ownership of content administration tool
5 Engagement Leaders	• Primary point of contact with campus stakeholders • Leads engagement teams: involved in planning, day-to-day oversight, communication and advocacy
Faculty Champion	• Responsible for faculty buy-in
6 Technical Leader	• Demonstrates familiarity with IT systems infrastructure; drives technology initiatives forward • Leads effort to ensure configuration and data extraction/transfer/maintenance go smoothly

EAB Team

- Launch Consultant
- Business Analysts
- Software Engineers
- Strategic Leader
- Research and Cohort Services Team
- Product Manager
- Data Scientist

Campus Stakeholders

- Senior Leadership
- Deans and Department Chairs
- Advising Unit Directors
- Advisors and Other Student Support Staff
- Faculty
- Students and Parents

Engagement Teams

	Workflow and Training	Analytics and Campaigns	Promotion and Communication	Content Development
Goals and Objectives	Represent various stakeholders to influence key site setup, and act as early experts of the platform who are equipped to train others.	Work with campus representatives to identify critical course milestones and encourage targeted campaigns based on historic data insights.	Develop and execute adoption and utilization promotion plans, build campus awareness, engage stakeholders.	Customize template content to fit your institution in Navigate Student. Develop additional content for special populations.
Members	Advising reps from each unit on campus: • Faculty Advisors • Advising Leads • Success Coaches • Technology Trainers	• Faculty Development Chair • Deans • Advising Coordinators/ Leadership	• Campus Marketing rep • Communications expert • Social media lead • Current student	• Content Administrator • Student Success rep • Career Services rep • Financial Aid/ Bursar rep • Student Affairs rep • Current student

Building Your Leadership Team

Application Administrator

Expert with an understanding of the overall student support structure on campus, basic technical knowledge, and larger roll out strategy

Responsibilities:

User Roles/Permissions Set Up
- Understand and create user roles
- Manage permissions by user and by role

Initial Site Set Up/Site Configurations
- Own building locations and services with workflow team along with other site configurations

Ongoing Support
- Maintain user access, roles, and permissions
- Modify any site-wide configurations
- Collect issue reports and enhancement requests
- Continue to work with EAB Team on larger items

Case in Brief: App Admin Serves as System Point of Contact

Karen Zunkel
Director for Undergraduate Programs and Academic Quality
Application Admin at Iowa State

- Leader in academic experience and success of undergraduate students
- Recognized for her service to Iowa State with award for Staff Excellence

- Very responsive to internal constituents and EAB Team
- Established Location Administrators to assist with unit-level autonomy
- Comfortable with technical processes
- Assists with questions about logging in, user access, permissions settings, site configurations, and data discrepancies

IOWA STATE UNIVERSITY

Content Administrator

Content manager has functional knowledge of advising and the student lifecycle, can coordinate additional content reviewers on campus

Responsibilities:

Publisher Role
- Adapt prepopulated EAB content with customized language for the institution into content management system
- Configures content to align with campus due dates
- Publishes finalized content

Content Development Role:*
- Works closely with content development team to solicit appropriate content edits
- *FUTURE: Segments specialized content based on relevant student subpopulations*

Ongoing Support
- Updates content based on new events and information

Technology & Workflow Audit

Setting Clear Expectations on Concurrent and Archived Technologies and Workflows

With any technology implementation, it's important to audit platforms that will be used in parallel and what will be sunset with the launch of Navigate. This audit will act as a baseline to understanding the technologies used at your institution, as well as the frequency and success of use.

Please complete the following audit and include any additional relevant information.

Questions	Member Responses
Student Information System • Year implemented*? • Upgrades expected? **May impact historical analytics*	
Degree Audit System	
Learning Management System	
Appointment Scheduling System	
Do you have any other student-facing mobile apps?	
Email and Calendar Client	Navigate will sync with Outlook and Google calendars to provide a two-way integration. Which of the below would you prefer to be visible to a user on their calendar when scheduling appointments through Navigate? • Add student ID to appointment body • Add student name to appointment body • Add student phone number to appointment body • Add student name to appointment title • Add student ID to appointment title
Note Taking System (for advising and other support services)	
Academic Early Alert or Progress Report System	

Workflow Audit

Advising Model	Current Practice	Future Goals
Do you have professional advisors, faculty advisors, or a mix of both? Please explain your advising model and units in detail. • How many advising units do students have access to? • Which departments offer professional advising? • Is there a centralized advising office for undeclared students, transfer students, first years, etc.?		
Are students assigned to advisors?		
Are advisor assignments in your SIS?		
If an advisor assignment is updated throughout the student's tenure, what is the process?		
Please describe any other details about the way your school does advising that will help us train your staff.		

Workflow Audit

Advising Processes	Current Practice	Future Goals
Do you already have a standard advising appointment scheduling process? If not, please describe other methods of scheduling. • Do advisors schedule their own appointments? • Can students schedule their own appointments? If so, how?		
What are the advising services that you offer students? What are these appointment reasons?		
Are there any advising services that must be provided by a student's assigned advisor? Example: Registration Code/Pin, Major Change		
Do your advising units offer walk-in appointments?		
Which of your advising units have front desk workers? • If you would like to expand the front desk for any location, please note		

Progress Report/ Early Alert	Current Practice	Future Goals
Do you currently have a Progress Report or Early Alert system in place? If so, please describe it.		
When and how often are progress reports typically sent? (i.e. how many times per term)		
Which students will typically be included in your progress report campaign (e.g. All student athletes, only freshman)?		
If you have used progress reports, what would you say has been your average response rate from your professors (e.g. "We typically get a 50% response rate from our professors")?		
Please describe any other details about the way your school does progress reports that will help us train your staff.		

Implementation Strategy

The implementation strategy for your school will be fine-tuned with support from your Strategic Lead and Launch Consultant.

Phased Approach

Phase 1

Core Strategic Care

Professional **advisors** live with campaigns, notes and messaging

Core Milestone Guidance

Students use app for **content, Intake Survey, major explorer and hold center**

Intelligence Major Req's

Population Health Dashboard and **Activity Analytics** live

Phase 2

Strategic Care Major Req's

Additional student support **Care Units**: faculty advising, tutoring, career services, etc.

Faculty provide input via Progress Reports

Milestone Guidance Major Req's

Appointment Scheduling live

Special population content (in alignment with Care Units)

Tips edited

Intelligence Major Req's

Institution Reports live for Leadership and Analytics teams

Success Markers decisions

Phase 3

Strategic Care Major Req's

Additional student **support Care Units** if applicable

Case Management

Milestone Guidance Major Req's

Special population content (in alignment with Care Units)

Intelligence Major Req's

Success Markers live

Predictive Model live

Implementation Plan

Confirm your implementation Strategy

Feature	Timeline and Scope
Core Strategic Care: Categories, User Roles, Advising Care Unit, Appointment Campaigns	Spring 2019: All professional advisors Fall 2019: All advisors (including faculty advisors)
Core Milestone Guidance: Intake Survey, Default Content, Hold Center, Major Explorer	Summer 2019: all students
Major Courses	
Additional Care Units: Tutoring, Athletics etc.	Fall 2019: Tutoring
Progress Reports	Summer 2019: faculty pilot Fall 2019: All faculty
Alerts & Cases	Spring 2020: advisors, tutoring Fall 2020: additional Care Units
Student Initiated Appointment Scheduling	Fall 2019
Success Network	Fall 2019
Special Population content	Fall 2019
Tips	Fall 2019
Success Markers	Fall 2019: all staff users
Enrollment Census	Not planned
Attendance	Not planned
Athletics: Study Hall, Travel Letters, Coach workflow	Not planned

Utilization Goal Setting

Confirm your implementation Strategy

User Group	Feature	Goals
Students	App Adoption Rate	1 month: - XX% of total student body - XX% of YY numbers of target student population 3 months: - XX% of total student body - XX% of YY numbers of target student population 6 month: - XX% of total student body - XX% of YY numbers of target student population 12 months: - XX% of total student body - XX% of YY numbers of target student population
Staff – Advisors	**Core Strategic Care functionalities:** student profile, advanced search, reports/notes	- Advising reports filed for all student interactions 1 month: - XX advisors are power users (10+ logins per month) 3 months: - XX advisors are power users (10+ logins per month) 6 months: - XX advisors are power users (10+ logins per month)

Communication Planning

Who, what, when and how of communicating your plan to campus

Steps in the Communication Planning Process

1. **Take Stock of Your Campus's Current Communications Practices and Resources**
2. **Articulate Core Messaging**
3. **Create Stakeholder-Specific Communication Materials**
4. **Develop a Schedule for Communications Delivery**


EAB

Communication Strategy
Toolkit

Tools and Templates for Communicating Your Strategy to the Entire Campus Community

For more information, please refer to the *Communication Plan toolkit*

Who?	Senior Leadership	Deans and Chairs	Advisors	Faculty Advisors & Faculty	Students* Promotion to students is a separate block
What do they need to know? **What** should be shared?	High-level goals and launch plan. Summary of how all stakeholders will be affected, highlighting *Intelligence*	High-level goals and launch plan Impact on colleges/dept's, highlighting *Intelligence* and *Progress Reports*	High-level goals and launch plan. Impact on workflow, with emphasis on *Core Strategic Care* blocks.	High-level goals and launch plan. Impact on workflow, with emphasis on *Intelligence, Progress Report* and *Core Strategic care* blocks	Quick intro to initiative App promotion customized for your institution
When should it be shared?	Determine appropriate schedule	Determine appropriate schedule	Determine appropriate schedule	Determine appropriate schedule	Determine appropriate schedule
How should information be shared?	Decide on combination of emails, memos, articles, live announcements, etc.	Decide on combination of emails, memos, articles, live announcements, etc.	Decide on combination of emails, memos, articles, live announcements, etc.	Decide on combination of emails, memos, articles, live announcements, etc.	Decide on combination of emails, memos, articles, live announcements, etc.

Student Promotion Planning

Discussion and Planning Guidance

- How would you like to structure and execute on your promotion plan to drive high utilization and adoption of the app?
- **Important Resource: Student Promotion Guide**

Before Phase I Launch

Digital Promotion Recommendations

Tactic	Owner	Date	Setup/Reference
Create and publish microsite			- "Digital Handbook" p12-14 & appendix
Send executive message or press release about Navigate			**-** "Adoption Toolkit" p3-8
Create a social media calendar/plan			- Digital handbook p6-11 & appendix
Decide whether you want to run adoption email campaigns			- "Digital Handbook" p15-1

In Person Promotion Recommendations

Tactic	Owner	Date	Setup/Reference
Conduct staff/faculty education information sessions about Navigate			

Student Promotion Planning

Importance of Active Promotion

Deploying a solid strategy to drive adoption and utilization is essential to realizing maximum returns from the platform, for staff, faculty, institutional leaders, and students. Based on results from previous launches of student success technologies, we know that a combination of direct, in-person and digital promotion tactics is the most effective way to generate student adoption; active promotion strategies can result in much higher platform utilization and 75 to 80 percent adoption rates for the student app. Institutions such as the University of Texas San Antonio and Stony Brook University have achieved great success with Navigate, due in part to organizing a robust promotion team and creating a culture where Navigate is an integral part of the university/college experience.

Promotion and Communication Team Responsibilities

- View the recorded demonstration of Navigate and the Engagement Team specific video
- Lead marketing and adoption projects for Navigate app, which may include direct in-person marketing at orientation and student events, as well as indirect online marketing through institution's social media and marketing channels
- Promote Navigate and its value proposition to different departments and groups, including faculty and staff, and ensure use of a common language when speaking about Navigate
- Create communication plan and collateral for Campus adoption to encourage and drive utilization across various institutional stakeholders

Typical Offices Represented on the Promotion and Communication Team

- Communications & Marketing
- Social Media Expert
- Admissions
- Orientation Leaders (Staff & Students)
- Residence Life
- Student Representative (i.e. Student Government Association)

Student Promotion Planning

During Phase I Launch

Digital Promotion Recommendations

Tactic	Owner	Date	Setup/Reference
Implement adoption email campaigns	Promotion team		- “Digital Handbook” p15-17
Customize and share app teaser video			- Ask EAB consultant to customize language for video - “Adoption Toolkit” p18

In Person Promotion Recommendations

Tactic	Owner	Date	Setup/Reference
Train orientation leaders on Navigate			- “Adoption Toolkit” p9-12
Present app at orientation sessions and instruct in-person download			
Incorporate Navigate into First Year seminar			- “Adoption Toolkit” p13-14
Deploy Navigate advertising assets (ex: postcards, posters, t-shirts)			- “Adoption Toolkit” p15-17

Student Promotion Planning

Post Phase I Launch

Digital Promotion Recommendation

Tactic	Owner	Date	Setup/Reference
Implement social media plan for all students			
Incorporate information about Navigate into 2-3 emails to students			
Implement utilization campaigns for current student users			

In Person Promotion Recommendation

Tactic	Owner	Date	Setup/Reference
Incorporate Navigate into First Year Seminar programs			

Training Strategy Planning

Decide how to best educate your Phase I users

Event	Owner	Date	Desired Outcome
EAB trains Workflow & Training (W&T) team	EAB Launch Consultant	XXX	Workflow & Training team is comfortable with Phase I workflows
W&T team independent study time	W&T team	XXX-XXX	W&T team gets to know Navigate, practices training others
In-person training sessions hosted by W&T team	W&T team	DATES	Phase I users get familiar with Navigate
Phase I users independent study time	Phase I users	XXX-XXX	Phase I users get familiar and comfortable with training site
Optional Office Hours post go-live	W&T team	DATES	Phase I users get their questions answered
Navigate Go-Live	Everyone	DATE	

Discussion and Planning Guidance

- What training tactics have been successful in the past?
- Based on size of Phase I user base, how many sessions need to be offered? Frequency? What incentives can you provide for training and office hours attendance?
- What types of users will you be training together vs separately?

Go-Live Planning

What is a Go-Live?

- Go-Live refers to a date when users start using Navigate
- Technical Go-Live happens before or at the same time as a functional Go-Live
- In the context of the implementation and communication to others, we use Go-Live as a functional milestone

How to determine a Go-Live date or dates?

- Navigate and Navigate Student can have two different Go-Live dates depending on the timing of your implementation
- Navigate Go-Live requires user training to happen prior to Go-Live
- Navigate Student Mobile/Desktop Go-Live does not require training for students, and just needs to align with your implementation timeline and promotion plans

What is required prior to a Go-Live?

- Navigate Student Mobile/Desktop
  - Technical go-live: data is validated and automated
  - SSO is working
  - All Phase I blocks are complete (content)
  - Promotion plan is implemented
- Navigate
  - Technical go-live: data is validated and automated
  - Peripheral set-ups are done (SSO, Calendar Sync etc.)
  - Training site is configured and workflow is validated
  - Configurations are copied to Production site
- Intelligence Go-Live happens after Navigate go-live by granting access to necessary users

Core Blocks

2

Strategic Care Core Blocks

- User Roles
- Care Units
- Appointment Campaigns

Smart Guidance Core Blocks

- Intake Survey
- Content
- Hold Center
- Major Explorer
- Academic Planning

User Roles

1 Confirm Functional Needs and Permissions by User Role

Understanding Key Decision Points

Each user role type will have a different level of access that falls into key decision-making areas. Below you will find the main areas in which the scope of access tends to differ within user role types. This is based on practices that we see frequently across the Student Success Collaborative. The final decision is ultimately up to the institution to ensure that the scope of access is reflective of campus culture.

Summary of default pre-set user roles and features

Role	Profile Access	Profile Access Restrictions	Issue Alert	Make Appointments	Historical Analytics	Contact Students	Add Notes/ Summary Reports	Edit Notes/ Summary Reports	Access to Reports
Advisor	All Students	All tabs	Yes	Yes	Predictive Model	Yes	Yes	No	Yes
Professor	Enrolled Students	Overview, Class Info, History	Yes	No		Yes	Yes	No	Yes
Academic Leadership	All Students	All tabs	Yes	Yes	Predictive Model; IR; Pop Health	Yes	Yes	Yes	Yes
Tutor	No Students	N/A	Yes	No		Yes	Yes	No	No
Tutor Admin	All Students	All tabs	Yes	Yes	Predictive Model	Yes	Yes	Yes	Yes
Front Desk	No Students	N/A	No	Yes		Yes	No	No	No
Admin	All Students	All tabs	Yes	Yes	Predictive Model; IR; Pop Health	Yes	Yes	Yes	Yes

Core Blocks: Strategic Care

User Roles

2 Confirm Functional Needs and Permissions by User Role

Bolded user roles and features indicate user roles necessary for Phase I

Role	Recommended Functionality	Notes
Advisor	• **Ability to access all student profiles** • **Core advising functionalities needed for advising workflow**: appointment scheduling, campaigns, note-taking • Core case management functionalities: issuing alerts for students, and managing cases	
Professor	• Ability to access limited information of students enrolled in courses • Core case management functionalities: issuing alerts for students	
Academic Leadership	• **Access to all historical and current student analytics** • Ability to access all student profiles • Core case management functionalities: issuing alerts for students, and managing cases • **Ability to manage progress report campaigns**	
Tutor	• Ability to manage own tutoring appointments • Basic tutoring functionality: add tutor notes • No access to student profiles	
Tutor Admin	• Ability to manage all tutoring appointments • Basic tutoring functionality: add and view tutor notes • Access to all student profiles • Access to all tutoring reporting	
Front Desk	• Ability to start **Appointment Center and Kiosk** • Ability **to schedule/cancel/edit all appointments** • No access to student profiles	
Admin	• **Full access to all data, functions, and administration features**	

User Roles

3 User Role Management

Create a Strategy for Assigning and Removing User Roles

Roles that we pull directly from or derive from the SIS will be allocated to users and removed as these roles change in the SIS through our nightly data feeds.

For roles that cannot be tracked through the SIS, a manual update strategy will be needed to manage granting and removing these roles to the appropriate staff or students over time.

Example Process to Grant a Manually Managed Role

1. Application Administrator receives request for access through Navigate help inbox
2. Application Administrator determines appropriate role for user – if access is needed and appropriate
3. Application Administrator grants individual user appropriate role through Navigate directly
4. Application Administrator responds to requester with either access or reason why access was not granted

Example Process to Remove a Manually Managed Role

1. HR or other relevant department notified application administrator of transition in role or faculty/staff leaving the institution
2. Application Administrator removes the user's role through Navigate directly.

Best Practice: Conduct Role Audits at End of Term

Manually added roles will not be removed from an individual until an application administrator manually removes access from an individual user or group of users. The application administrator(s) should run and review lists of staff and faculty who have access to the system at the end of every term to ensure that those have left the institution or moved to different roles do not maintain access to student data that is not appropriate.

How To: Lists of which users are currently assigned to each role can easily be run by an application administrator in the advanced search by selecting 'All Users' as under 'Type', and then specifying the desired role.

Care Units

Introduction to Care Units

Coordinated Care Unit
(noun)

An entity in Navigate that allows any team to support students on their path to graduation via customized appointment scheduling, reporting, and access to data to assist with decision support

Expanding the Coordinated Care Network

The Coordinated Care Network was designed to support student success efforts at each institution by enabling critical activities, such as direct student intervention and cross-team collaboration. Institutions can easily expand technology use and collaboration to additional teams that aim to improve student success. With Care Units, members have the opportunity to expand and streamline technology adoption across the entire student support network.

Creating Care Units outside of advising and tutoring may not be the right answer for all institutions, but may be an excellent solution for others. We will walk you through some key considerations and guide members to determine if and when a new Care Unit might be the right answer.

Please refer to the Coordinated Care Units: Ideas and Recommendations and Coordinated Care Units: Administration Guide for additional information.

EAB's Recommendation:

Keep Care Units simple. We recommend one Care Unit per each support area on campus: 1. Advising, 2. Tutoring, 3. Athletics, 4. Career Services etc.

Care Units

Appointment Scheduling – Recommended Rollout

Phase I: Staff Initiated Appointment Scheduling		Phase II: Student Facing Scheduling	

1 Advising Appointment Campaigns

- Located in student emails, Navigate student
- Students receive prompts from an advisor to schedule a specific type of appointment (i.e., registration pin appointment) and select an available time

2 Front Desk Scheduling

- Located in Appointment Center
- Front desk staff schedule, edit, and check students into their appointments via a scheduling grid of available advisors
- Students can drop in to appointments if advisors are available

3 Student Initiated

- Located on student homepage in desktop, or Navigate Mobile
- Students proactively schedule their own appointments, navigating through a series of questions to narrow down their options to meet with an advisor

EAB & Leadership Team to decide on **student scheduling Go-Live date**, once a majority of advisors have set up availability in the desktop site.

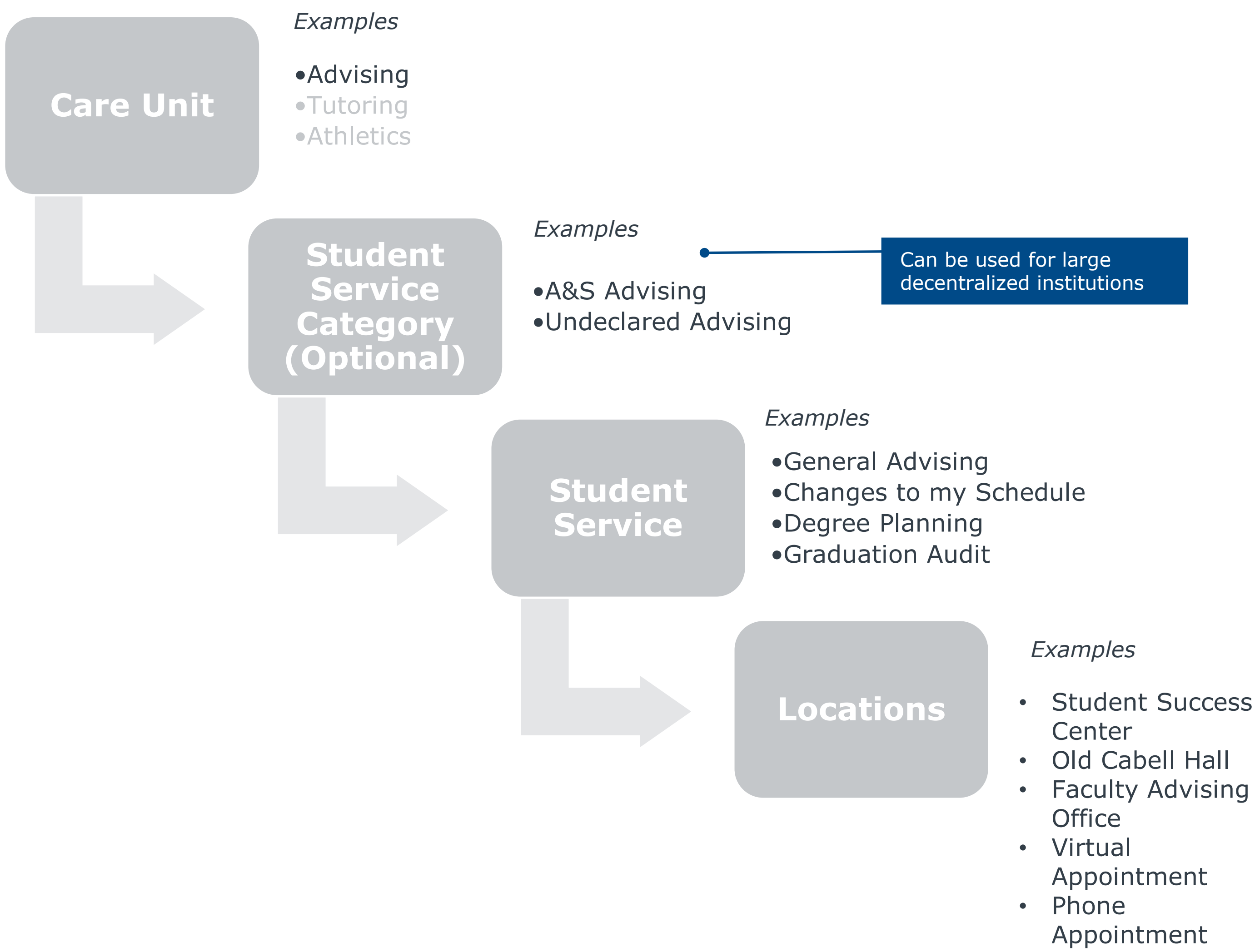
Discussion Guidance

- Which group of Advisors would be amenable to piloting your first Appointment Campaign?
- What time of year would be best to turn on student-facing appointment scheduling in the app?

Core Blocks: Strategic Care

Care Units

Student Scheduling Workflow



Discussion Guidance

- What is the best way to make it as easy and quick for a student to get to the staff member that they should schedule with?
- What services does your team care the most about as far as reporting? What is crucial to be able to report on?

Care Units

Student Service Categories

Student Service Categories are optional. Large decentralized institutions may use these to group services together within a Care Unit. The purpose of care units is to group services together such that it is easier for a student to get to the right staff member. No reporting is done based on student service categories.

An optional configuration within Student Service Categories can also restrict viewing of student services to a specific population. For example, you can allow only Honors students to view Honors Student Services, if you had that as a Category automated from your SIS.

Example from other institutions are below

Student Services
College of Arts & Sciences Advising groups together advising services that are specific to just this college at a large decentralized institution that has a professional advising operation fully separate from the other colleges
Honors Advising groups together Honors-specific services that are only applicable to honors students within Advising care unit.

Discussion Guidance

- How decentralized is your campus? Are processes across colleges different enough to require student service categories?
- Are they going to be changing in the near future?
- Can Navigate implementation be used to simplify services and align cross-college operations to more closely mirror one another?

Care Units

Services

Student and staff schedule appointments for reasons, or 'Services' specified through the platform. Services are the primary starting point for all scheduling and becomes the backbone for reporting and determining the reason for an appointment.

Please use the list of student services listed below as a starting point.

Student Services
Change of Major/Minor
Adding or Dropping Courses
Course Selection
Graduation Audit
Academic Probation Advising
Degree Planning
General Advising
Registration PIN
Academic Support
Post-Graduate Plans/Graduate School
Career/Job/Internship
Research Opportunities
Personal
Major Advising *(could also create a service for all available majors that offer advising)*

Discussion Guidance

- What is the best way to make it as easy and quick for a student to get to the staff member that they should schedule with?
- What services does your team care the most about as far as reporting? What is crucial to be able to report on? Try to articulate use case for each student service.
- Does every understand what each service means? Would students?

Care Units

Locations

Identify any areas or places where an appointment can happen when selecting Locations. Locations do not have to be a physical location or an office location, but can be a central Advising Center location, a College, or a general place where students would go to receive support services.

Consider Locations from the student perspective: students will be required to choose a location when scheduling an appointment. Students will only see the applicable location that has the service that they choose assigned to it. When configuring Navigate, within each Location you will choose Services that are associated with that Location. An individual user must also specify the location where they will provide certain services to students.

Note: staff will specify details about where exactly to find them when setting up availability under Additional Details. Therefore, Locations can be broad.

Examples
Undergraduate Advising Center
College of Arts and Sciences – Faculty Advisor Office
Old Cabell Hall
Old Cabell Hall – Department of English
University Hall – Athlete Services
Alderman Library
Offsite location
Virtual Appointment
Phone Appointment

Care Units

Cancellation Reasons

When an advisor or other user cancels an appointment, they will be prompted for a reason. Common selections include options such as ‘cancelled – student request’ or ‘cancelled – advisor request’, but others may be appropriate for your institution.

Please select the reasons that should be available when cancelling an appointment and mark additional ones as needed.

Cancellation Reasons
Cancelled – Student Request
Cancelled – Advisor Request
Illness
Emergency
Scheduling Conflict
Not Prepared
Weather/School Closure

Meeting Types for Summary Reports

When an advisor is completing an Advising Summary Report, they will have the option to select a Meeting Type or the forum in which the appointment or interaction with the student took place. Administrators can then run reports on this field to determine the frequency with which appointments and interactions are being held across these different mediums.

Please select the Meeting Types that should be available when completing a Summary Report.

Meeting Types
In Person
Phone
Email
Virtual (Skype, Zoom, Videoconference)

Care Units: Note Taking

Appointment Summary Reports

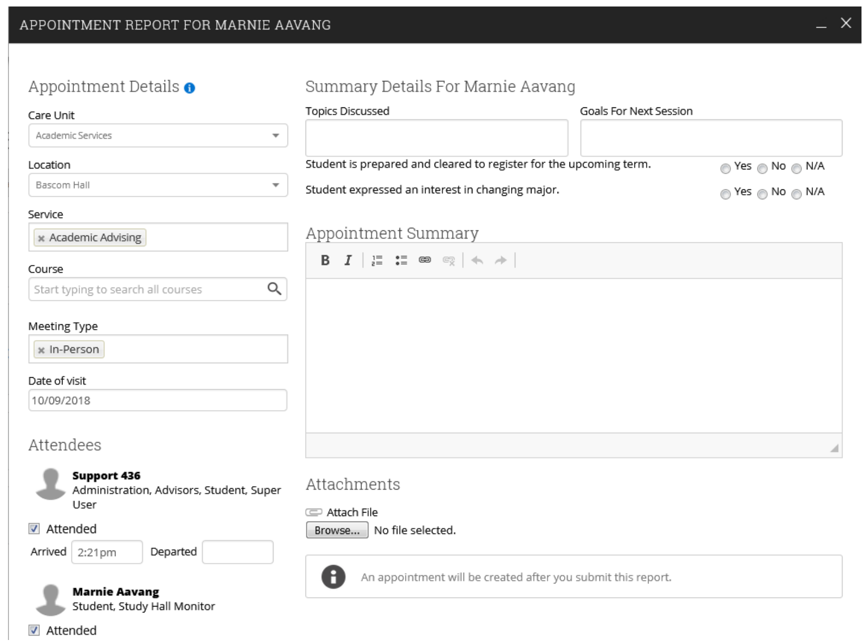
Logged after official student interactions

Purpose:

- Filed after each Appointment to record what was discussed
- Automatically stores location, service, duration details for easy reporting
- Customizable template can add Care Unit specific questions for staff to complete for
- Reporting

Visibility:

- Visible to all Staff within a Care Unit (i.e., all Advisors)
- All or nothing: institution must decide if students can view all or none of their Appointment Summary Reports



Notes

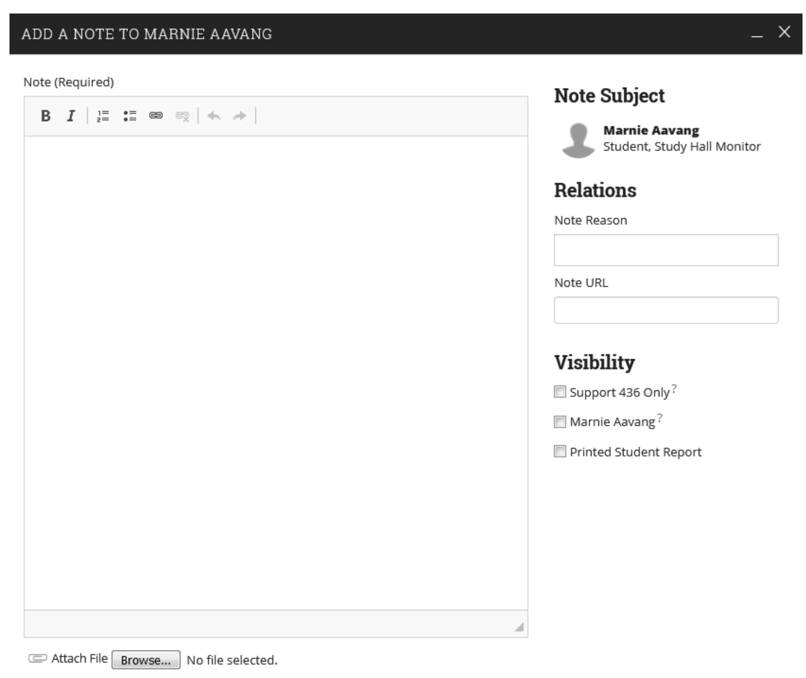
Filed at any time, regardless of whether an appointment was held

Purpose:

- Storing need-to-know information about a student that may not have come out of an appointment (i.e., preferred name)

Visibility:

- Visible to all Staff across Care Units (i.e., institution wide)
- Note-by-Note visibility allows students to log in and view notes on an as-needed basis



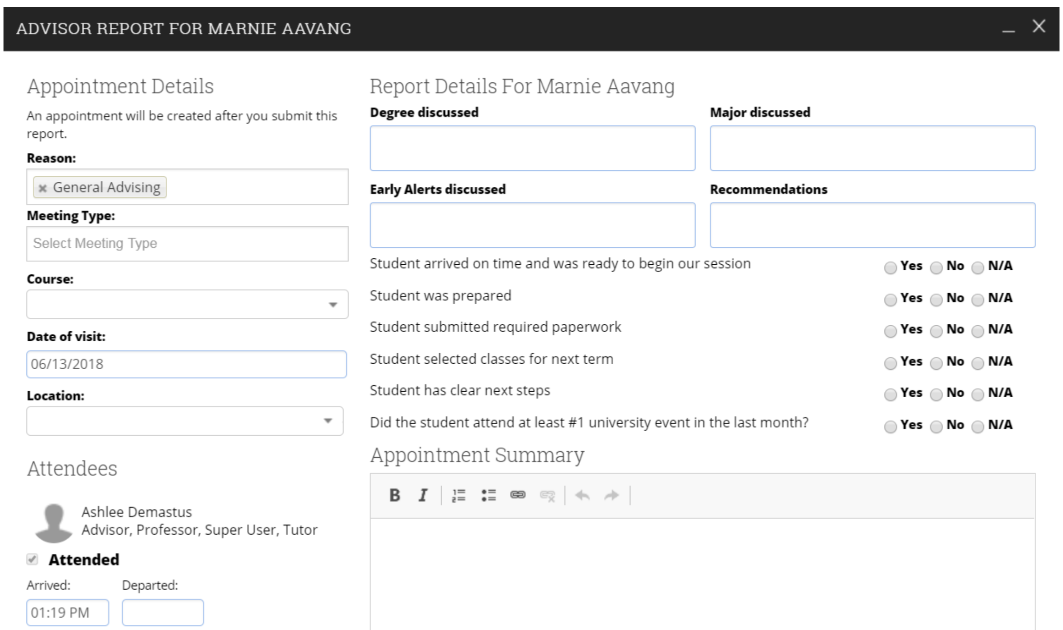
Core Blocks: Strategic Care

Care Units

Configurable Summary Report Templates

Users have the ability to fill out a summary report following an appointment. Each care unit can customize a unique summary report template that reflects their main areas of concern and unique interests. Each summary report template has the ability to include four open text boxes and up to 6 'yes, no, n/a' questions to standardize the conversation or track key metrics.

Example Summary Report



EAB Recommendation

- Keep it simple for Phase I: turn off all yes/no questions and open text boxes. Keep just the free-form Appointment Summary box.

Discussion Guidance

- What is valuable for staff to report that may not make it into Appointment Summary?
- You can run reports for all completed summary reports and sort/filter answers in four boxes and yes/no questions in Excel. What do you envision doing with that data?

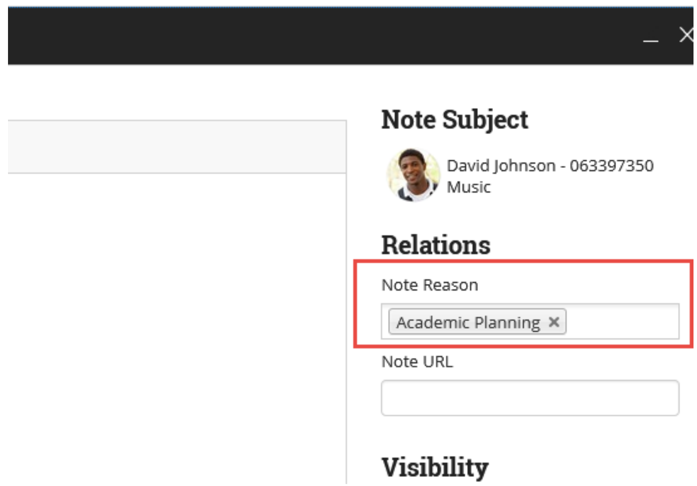
EAB Workflow Configuration: Notes

Note Reasons

When an advisor or other user creates a note, they can add 'Reasons' for the note that can then be searched by in the History tab for easy access.

Please add the reasons that should be available when submitting a Note (this is an optional configuration)

Note Reasons



Text Messaging Set-up

When a user sends a text message to a student from Navigate, the student will get it from a short number. They will not be able to text back. If you want the student to be able to text back, each user will need to be assigned a "Navigate phone number" that will simply link to their Navigate account (when a student texts back, they will get a message in Navigate and their email).

Please send a list of users to your Launch Consultant and Strategic Leader that need to be assigned Navigate phone numbers.

Long-term maintenance recommendation: Application administrator should maintain a list of users with assigned phone numbers. If someone no longer needs their number, please let EAB know. If a new user needs one assigned, please let EAB know.

Care Units

Putting it all together

1. Set up Care Unit Structure

Section and configurations	Recommendation (for Core Advising)
Overview	
Name of unit (staff and student-facing name)	Advising, Tutoring, etc.
Decide how much time to apply to a visit if a student forgets to check out?	30 minutes
Require Staff to Acknowledge Compliance Disclaimer when Saving an Appointment Summary	No (only for Athletics)
Select Appointment Summary Template	Advising, Tutoring etc.
Show detailed questions and boxes on appointment summary	No
Services	
Add applicable services	
Student Service Categories	
Decide if student service categories are needed	
Communication	
Appointment email configuration: Include attendee phone numbers in appointment emails?	No
Appointment email configuration: Include all comments in group appointments?	No
When an Appointment is scheduled, send an Email to:	None; attendees get notified by default
When an Appointment is cancelled, send an Email to:	None; attendees get notified by default
When a student is a no-show for an appointment, send email to:	Student
When Student request appointment, send email to:	None; only applicable if students can request appts
Appointment reminders: Send by default	Yes
Text message reminders: send by default, always (not on option to uncheck for student), or never; Time in advance	By Default; 60 minutes
Appointment Scheduling Configuration	
Prevent appointment scheduling if X+ no-shows in X days	
Student scheduler configuration	Change default language

Core Blocks: Strategic Care

Care Units

Putting it all together

2. Tie locations and services

Location Settings	Recommendation (for Core Advising)
General	
Name of location (staff and student-facing name)	See Locations care unit slide
Active	Yes
Description (optional – app admin facing only)	
Custom kiosk help text (if students tries to check in when nothing is available)	Customize default text
Limit student appointment to specific group (legacy setting – please ignore)	No
Allow students to schedule on 15 min offset of an hour (to optimize scheduling blocks)	Yes
Care Unit and Service Configuration	
Associate Care Units with location	
Associate Services with this location; for each service configure:	
Record Visit (student swipes in only to track visit), Track Time (students swipes in and out to track time), or Appointments, Drop-ins, Request (student can schedule, drop in, request appts)	Appointments, Drop-Ins and Requests with Staff
Default appointment length	30 mins
Require Course when Service is selected within Student and Staff Scheduling, Availabilities, Appointment Center, Kiosk, Appointment Summaries, and Appointment Campaigns	No
Allow Students to Add Themselves to a Specific Staff User's Queue when Checking in for Drop-in Visits	Yes
Allow Students to Add Themselves to the First Available Queue when Checking in for Drop-in Visits	Yes
Allow Students to View Drop-In Availabilities within Student Scheduler	Yes
Allow Students to Request Appointments within Student Scheduler	No
Only Show Location if there is an Appointment Availability for the Service Selected when a Student is Requesting an Appointment	Yes
Allow Students to Schedule Appointments within Student Scheduler	Yes
Allow Students to Choose from a list of Staff when Scheduling	Yes
Allow Student to only Schedule with Assigned Staff within Student Scheduler	Yes only if assignments are well maintained
Limit Services shown in the Student Scheduler to Students in the following Categories / Majors	
Number of Hours Ahead of Time Students are Allowed to Schedule an Appointment	1
Number of Days into the Future Students are Allowed to Schedule an Appointment	30
Number of Hours in Advance Students are Allowed to Cancel an Appointment before it starts	1
Max Number of Appointments Students can Create per Day, per Service	No limit
Max Number of Upcoming Appointments Students can Have at Any Given Time, per Service	Bo limit
Weekly Appointment Time Limit per Service	No limit

Care Units

Putting it all together

3. Add any additional roles

Discussion Guidance

- Does this care unit require any additional access levels? If so, does that role exist in SIS, or should it be created manually?
- What should the new user base be able to do?

EAB Recommendation

- Example of a Care Unit that may require an additional role is Tutoring. You can create a Staff Tutor role (that has access to student data), or a Student Tutor role (that can only schedule appointments / add Summary Reports / start Kiosk to check students in

4. Create a training and go-live plan

Discussion Guidance

- What are the expectation of Navigate use for the new care unit? Formalize those expectations before training.
- What is the best way to train those users? Is there a super user in that new group that can help you test your desired and created workflows in training?
- When is new care unit expected to go live?

Appointment Campaigns

What is an Appointment Campaign?

Users can launch appointment campaigns for specific student populations. To launch a campaign, you need to identify student population, add staff member(s) who should meet with selected students, and customize email that will go to students. You can then monitor student response rate.

Decision Points	EAB Recommendation
Who should have the ability to launch campaigns? For who? • **Application Administrator**: see permissions under Care Unit Permissions → Appointment Campaigns	All advisors should be able to launch campaigns for themselves; Advising Leads should be able to launch campaigns for themselves and others.
Who should be able to view if student is associated with a campaign? • **Application Administrator**: see permission under Student Profile → View Student's Campaign Involvement	Anyone with access to student profile should see if a student is part of a campaign
Decide on custom message for Appointment Campaign expired links. • **Application Administrator**: see Group Configurations → Custom Message for Appointment Campaign expired links	*EAB Default: The link was part of a campaign that has ended. Please contact your administrator for details.*

Discussion Guidance

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

Your Strategic Leader will lead you through a campaign planning workshop to organize your campaign calendar and set metrics for success.

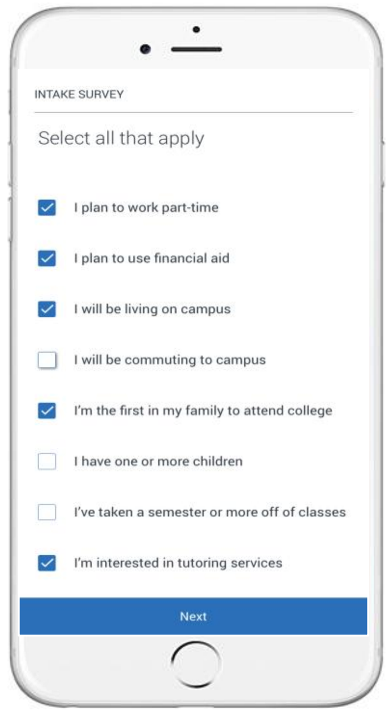
Core Blocks: Milestone Guidance

Intake Survey

What is the Intake Survey?

The intake survey is a mandatory questionnaire that students must fill out to access the app. The intake survey gives students an opportunity to self-select identifications to receive targeted content and subsequent outreach. The responses that you create are meant to do one of the following: gauge student interests, gather or verify data, and/or target student subpopulations. The distribution of responses will be available to you through a utilization report that your strategic leader provides and on the “Student Profile” page in Campus.

Question	Response Choices
This is my first semester at [your institution].	• Yes • No
I am a…	• 1st year • 2nd year • 3rd year (if applicable) • 4th year (if applicable)
Select all that apply	• I plan to work part-time • I plan to use financial aid • I will be living on campus • I will be commuting to campus • I’m the first in my family to attend college/university • I have one or more children • I’ve taken a semester or more off of classes • I’m interested in tutoring or writing services • I want to get involved on campus • I’m interested in volunteering • I’m interested in study abroad • I plan to graduate this semester • None of the above



The options under “Select al that Apply” are completely editable. We recommend having no more than 15 options total.

Discussion Guidance

- What information are you hoping to gather about students through the intake survey?
- Are there individuals and departments that can follow up with students that indicate particular interests or needs?

Content

Part I: To-Dos (Student Tasks as Determined By Institution)

To-Dos

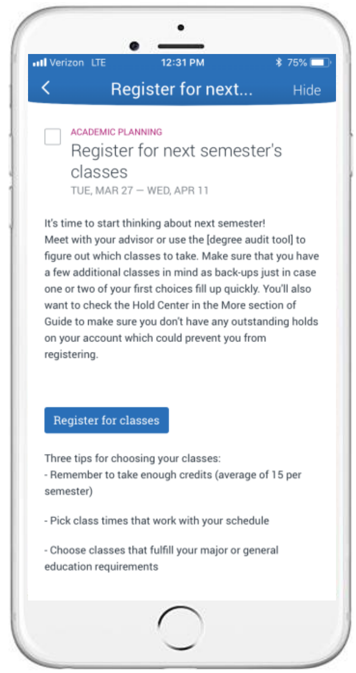
Feature Functionality:

To-Dos are action items that students need to be aware of and complete in order to stay on track at your institution. Each To-Do is listed underneath a relevant "topic" name. When students click on the To-Do, they will see corresponding details, links, and contact information relevant to taking action. After a student views a task, he or she has the option to "complete" or "dismiss" it.

Content Composition:

Each To-Do should include:

- Call to action- verbiage that encourages the student to complete this task
- Link(s)- Website(s) that give the student additional information
- Detailed Description: Simplified text that explains the importance of the task and how students should get started
- Contact Information: Email Address and Phone numbers for relevant department



Calendar Events

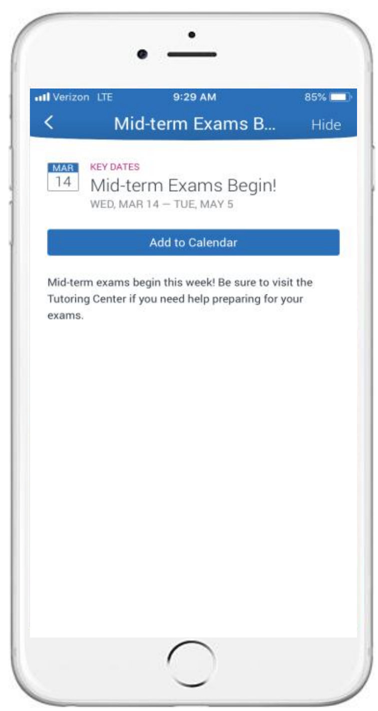
Feature Functionality:

In mobile, students can see upcoming key dates or Calendar Events. When students click on the calendar event, they will see corresponding details and an "Add to Calendar" button. This button allows students to sync the event to their smartphone's default calendar (ical, outlook, etc).

Content Composition:

Each calendar event should include:

- Detailed description
- Physical Location: Latitude and longitude
- Hours of the event
- Contact Information: An email address or phone number to utilize for additional information



Core Blocks: Milestone Guidance

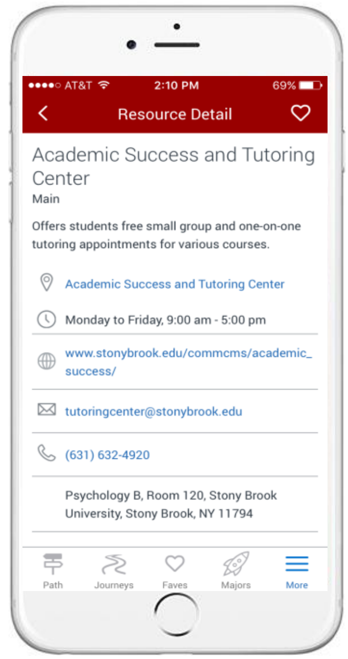
Content

Part I: Resources & Locations

Resources

Feature Functionality:

Students can click into any resource category and browse through all the corresponding offices and services. Each Resource contains additional details including contact information, and relevant web links. Each Resource also links to the phone's native maps application to get walking or driving directions to the exact location. Students can "favorite" resources to find them easily later.



Content Composition:

The details for each resource listed must include the following:

- Detailed description
- Physical Location: Latitude and longitude
- Website
- Email Address
- Phone number
- Additional information: Room number, relative location, etc.

Locations

Feature Functionality:

In mobile, both Calendar Events and Resources can have physical locations linked in their details. When students click on the location within the calendar event or resource, they will be brought to their phone's native maps application to get walking or driving directions to the exact location.

Content Composition:

Each location should include:

- Name
- Campus
- Physical Location: Latitude and longitude or Street Address
- Comments (Exclusively for internal tracking)

Content

Part I: Tips

Tips

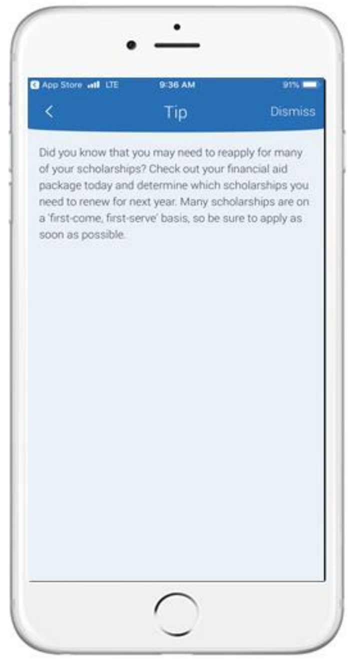
Feature Functionality:

Tips are nudges for students to get more out of their experience. This can range from interesting facts to social norms. Each Tip is listed underneath a relevant "topic" name. When students click on the Tip, they will see corresponding details, links, and contact information relevant to that specific tip. After a student views a task, he or she has the option to "dismiss" it.

Content Composition:

Each Tip should include:

- Title
- Detail Description
- ***Optional***: Link(s)- Website(s) that give the student additional information



Next Steps for Content Development Team

- ❑ Your site will be prepopulated with our recommended Default Content. After going through a CAT training, the Content Development Team is responsible for deciding which of the prepopulated content to use and editing them to reflect the school in the site and updating the Content Administrator of the final list.
- ❑ The Content Administrator is responsible for reviewing the edits of the content in the CAT, making any additional necessary changes, and publishing.

Discussion Guidance

- What kind of information is most critical for students to know about throughout the schoolyear? How does the content align with institutional priorities such as student engagement, campus culture, etc?
- How can you best organize and customize content in a way that is mobile-optimized and student-friendly to cut through the white noise of email and/or social media?

Core Blocks: Milestone Guidance

Hold Center

What is the Hold Center?

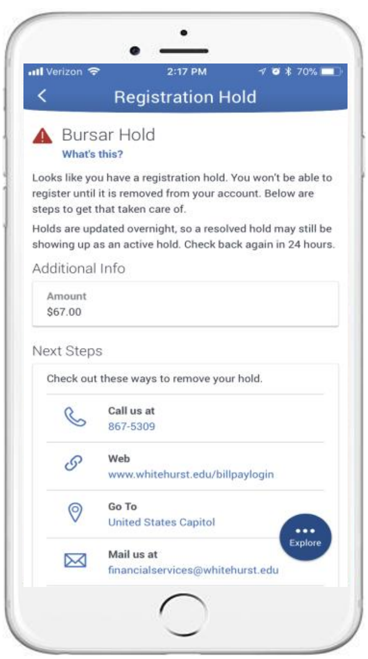
The Hold Center is an active intervention resource in app that alerts students when they have a hold on their accounts. The Hold Center receives information from your institutions' SIS, so the data in this feature updates on a nightly basis.

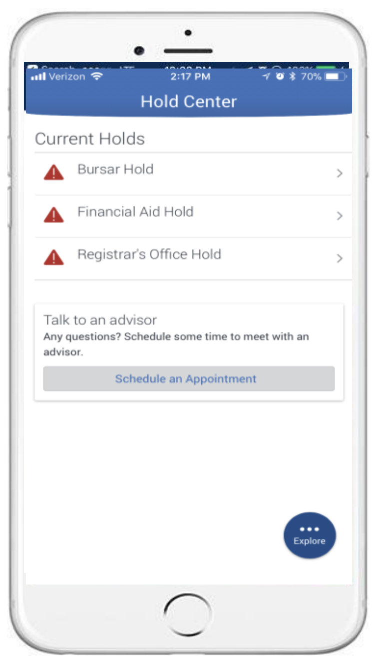
What Information Does the Hold Center Include?

The Hold Center provides students with the following information:

- Definition and description of the hold
- Amount due (if applicable)
- Next Steps (Methods to Resolve Holds), including:
    - Phone Number
    - Website
    - Location (with directions to corresponding office)
    - Email Address

The Hold Center is completed by your institutions technical team and your dedicated EAB Implementation Business Analysts.





Core Blocks: Milestone Guidance

Major Explorer

What is the Major Explorer?

The objective of Major Explorer is to help students explore best-fit majors based on their interests and skills and find federal BLS and O*NET career and salary data associated with majors. As its name implies, Major Explorer is meant to be an **exploratory**, rather than **prescriptive** tool. Major Explorer helps get students thinking about what they want to learn in college and accomplish in their careers, so that they can have more productive conversations with advisors.

How Does Major Explorer Work?

During the intake process, students are prompted to choose up to 3 of the following that they enjoy most:

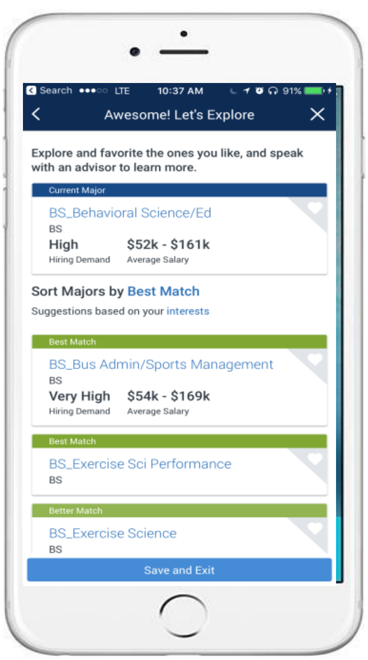
- Interests
- Activities
- Subject Areas

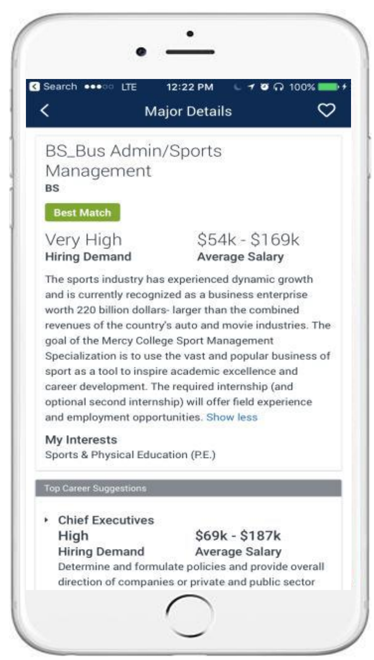
The information gathered from the intake process is used to direct students to majors and related careers. A proprietary algorithm links student responses to active majors at your institution.

How Is Major Explorer Created?

The majors that students see are specific majors at your institution. Students may see any active major based on their responses.

All salary and hiring demand data comes from O*NET. National-level data is provided by default, but members can request to use data specific to their state or to turn off those fields completely. We recommend that you use this data to help foster conversations with students about their interests and major/career prospects.





Additional Blocks

3

- Additional Care Units
- Progress Reports
- Alerts and Cases
- Enrollment Census
- Attendance

Additional Care Units

Why would you set up additional Care Units?

Each type of major student service on campus should be a separate Care Unit. This allows for:

- Easier scheduling workflow for students
- Ability to customize scheduling and reporting workflow for staff
- Ability to assign permissions by Care Unit by role

Examples of additional Care Units

Examples of Care Units are:

- Tutoring
- Advising
- Athletics
- Career Services

Each Care Unit has to be managed by your application administrator. As such, while Care Units provide more flexibility, they also require more management. EAB recommends capping the number of Care Units at 4-6 depending on size of school.

What Care Units do you envision having?

As part of the implementation, please discuss what Care Units may be needed beyond Phase II. We recommend setting up those Care Units in Training even though you may not be going live with those units until later.

Additional Blocks: Strategic Care

Progress Reports

Information and Action to Increase Student Success

Progress Reports allow member institutions to gather feedback on student performance and identify potential barriers to success. Often used in tandem, Progress Reports proactively request feedback from faculty, while any user with the correct permission can enter Alerts when they notice a student in need and want to connect them with the appropriate resources.

Progress Reports

Individual Student Performance

- Solicit feedback from faculty to understand individual student performance in each course.
- Collect information on:
  - –A student's likelihood of failing a class
  - –Their current or anticipated grade
  - –Current absences
  - –The need for a potential Alert
- From Progress Reports, an advisor can:
  - –Intervene with students early and understand the reasons for risk
  - –If necessary, create an Alert for thorough follow-up from another office
  - –Guide students to relevant resources

Alerts and Cases

Coordinated Care

- Users flag a student who may be in need of additional attention by simply clicking on the "Issue an Alert" button at any time.
- Through Alerts, administrators and advisors understand what types of services students require most.
- Faculty and other campus constituents can use Alerts to feel more empowered to report their concerns and be informed on the follow up.
- Through triage settings, institutions can create a thorough coordinated care network where individuals receive alerts base on their expertise and the resources they provide students.

Discussion Guidance

- How confident do you feel about advisor readiness for effective case management? **Work with your Strategic Leader to review "Coordinating End-to-End Early Alerts" (CONNECTED18)**
- Before reviewing configuration decisions, please work with your Launch Consultant to understand typical workflow
- How would you like your early alert process to change? Who should be accountable for following up on alerts submitted by faculty and staff?
- Progress Reports: who should initiate campaigns? Will this replace any existing process? What expectations do you have of faculty?
- General Case Management: should each alert reason initiate a case? Write our process workflow by each reason? Who owns follow up? Who should receive communication?

Additional Blocks: Strategic Care

Progress Reports

Process Overview

Progress Report campaigns initiate a feedback request that faculty can easily respond to throughout a semester. This worksheet will help you understand the different options for configuring Progress Reports and isolate which settings should be turned on for your institution.

Progress Report Process Overview

Administration initiates progress report request → **Faculty completes progress report** → **Staff and Student can receive email with feedback** → **Staff member follows up on concerns**

Configurations Decisions

Setting	EAB Recommendation/Default	Comments
Allow token authentication for progress reports	This setting allows faculty to log in with their SSO credentials after clicking on the link to complete progress report ***EAB Recommendation: Y***	
Evaluation link expiration in days	This setting determines how many days the Progress Reports link is active before it expires. ***EAB Recommendation: 60***	
Show Student IDs on claim page	This setting determines if the student ID is shown on the Faculty Progress Report Feedback page. ***EAB Recommendation: Y***	
Show "At-Risk" Column	This setting determines if faculty can mark a student as "At-Risk" for a given course, as well as phrasing of that question **EAB Recommendation:** Y **Default Column Title:** At-Risk to Fail Your Class?	
Alert Reasons Verbiage	This field allows faculty members to choose a reason for why an Alert is issued. Please refer to the "Alerts" section of this document to customize the Alert Reasons. For progress reports, alert reasons have to clearly indicate why student is at risk. ***Default Column Title:*** *Alert Reasons (You must choose at least one if you have a concern about the student)*	

Progress Reports

Configurations Decisions, Cont.

Setting	EAB Recommendation/Default	Comments
Show "Absences" Column	This setting determines if faculty can list the number of absences a student has for a given course in an open text box. **EAB Recommended Setting:** Y **Default Column Title:** How Many Absences?	
Show "Grade" Column	This setting determines if faculty can choose the current grade a student has for a given course in a drop-down. **EAB Recommended Setting:** Y **Default Column Title:** Current Grade	
Show "Comments" Column	This setting determines if faculty can provide comments on a student's current performance in a given course. **EAB Recommended Setting:** Y **Default Column Title:** Comments	
Progress Report Instructions	The message below appears at the top of the Progress Report claim page that is completed by professors. **Default Text:** You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.	
Button to submit only marked students but not be finished with the feedback	The text below appears on the button a faculty member would press if they have already completed feedback for some students but not all. By pressing this button, a faculty member would only be marking those with feedback as "complete", and these students will disappear from his or her list. Only unmarked students will remain on the list. **Default Text:** Submit only marked students (but I'm not done)	

Progress Reports

Configurations Decisions, Cont.

Setting	EAB Recommendation/Default	Requested Change(s)
Instructions to submit only marked students but not be finished with the feedback	The instructions below go along with the button listed in the previous box. **Default Text:** This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the Progress Report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.	
Button to submit all un-marked students as not-at-risk	The text below appears on the button a faculty member would press if they have already completed feedback for some students but not all. By pressing this button, a faculty member would mark any student for whom they have not written any feedback as “not-at-risk”. **Default Text:** Submit unmarked students as not At-Risk (I'm all done)	
Instructions to submit all un-marked students as not-at-risk	The instructions below go along with the button listed in the previous box. **Default Text:** This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your Progress Report campaign.	

Progress Reports

Configurations Decisions, Cont.

Setting	EAB Recommendation/Default	Comments
Student At-Risk Email Subject	If a student is set to receive an email once a faculty member marks them as "At-Risk" (see the **User-Facing Decisions**), this is the subject line for that email. **Default Text:** You were evaluated as at risk	
Student At-Risk Email Header	If a student is set to receive an email once a faculty member marks them as "At-Risk" (see the **User-Facing Decisions**), this is the header for that email. **Default Setting:** You were evaluated as at risk	
Student At-Risk Email Body	If a student is set to receive an email once a faculty member marks them as "At-Risk" (see the **User-Facing Decisions**), this is the message in that email. **Default Setting:** You have received this email because of a professor evaluation in one of the classes you are enrolled in this term.	

User Role Permissions: Make sure you have enabled the appropriate permissions related to progress reports for the corresponding user role type.

Progress Report View	This option allows the user the ability to view any progress reports that have been submitted on a student they are able to view
Progress Report Campaigns	This option allows users the ability to view and create progress report campaigns requesting feedback on student academic performance from faculty
Progress Report Create	Allows user the ability to create Progress Reports
Update Own Progress Reports	This option allows the user the ability to update only their own progress report campaigns
Delete Own Progress Reports	This option allows the user the ability to delete only their own progress report campaigns. Please note that anything deleted in the system cannot be recovered.
Progress Report Update	This option allows the user the ability to update ANY progress report feedback.
Progress Report Delete	This option allows the user the ability to delete any progress report feedback. Please note that anything deleted in the system cannot be recovered.
View Comments on Progress Reports About Them	This permission is only applicable to students, when a progress report is submitted by a faculty member should the students see the comments

Progress Reports

Setting	EAB Recommendation/Default	Comments
These settings are located under Administration → Group Settings		
Allo students to view their Progress Reports	This setting determines if a student can view their own Progress Reports. **Default Setting:** N	Please note this feature is not available in the student app. Please set to N.
Send an email to advisors when students are marked as at-risk	This setting determines if an email is sent to advisors if faculty mark students as "At-Risk" on a Progress Report **Default Setting:** N	
Display student ID an email to advisor	If an email is sent to a student advisor once a faculty member marks their student as "At-Risk", this setting determines if a student ID is displayed on that email. **Default Setting:** N	
Send an email to coaches when students are marked as at-risk	This setting determines if an email is sent to coaches if faculty mark students as "At-Risk" on a Progress Report. **Default Setting:** N	
Send an email to student when they are marked as at-risk	This setting determines if an email is sent to a student if faculty mark him or her as "At-Risk" on a Progress Report. **Default Setting:** N	
Custom message sent to student once he or she is marked as at-risk	The message below can be sent to a student if he or she is set to receive emails once marked "at-risk" (see setting above). **Default Text:** (Blank – no default text)	
Custom message for Progress Report Campaign expired links	The text below displays once a Progress Report link has expired. **Default Text:** This link was part of a campaign that has ended. Please contact your administrator for details.	

Additional Blocks: Strategic Care

Progress Reports

Campaign Decisions

> **Note:** The decisions below are available customizations whenever you create a Progress Report Campaign. These decisions are *not set* by the previously mentioned Configurations or User-Facing decisions.

Setting	Description
Subject line of email to faculty when requesting Progress Report feedback	Whenever an advisor requests feedback from a faculty member via email on a student's current progress in a course, this is the subject line in the email. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Body of email to faculty when requesting Progress Report feedback	Whenever an advisor requests feedback from a faculty member via email on a student's current progress in a course, this is the body of the email. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Sender of the at-risk email to students	If students are set to a receive an email once they are marked at-risk, this is the individual from whom the student will receive the email. **Default Setting:** (N/A – Can choose one of the of the following for each Progress Report Campaign: Campaign Creator, Student's Advisor, Professor of the At-Risk Course)
Date to exclude students who have already had requests sent to professors since past date	Any students who have Progress Reports submitted on their behalf by faculty members after this date will be excluded from the campaign. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Date of expiration link for Progress Reports	The link to submit a Progress Report will no longer be active after this date. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Send a Thank You message to instructors upon completion	This setting determines if a thank you message is sent to a faculty member once he or she completes all Progress Reports in a given campaign. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Subject line of Thank You email to faculty who complete Progress Reports	If a faculty member is set to receive a thank you email after completing all Progress Reports in a given campaign, this is the subject line of that email. **Default Setting:** (N/A – Customized for each Progress Report Campaign)
Body of Thank You email to faculty who complete Progress Reports	If a faculty member is set to receive a thank you email after completing all Progress Reports in a given campaign, this is the body of that email. **Default Setting:** (N/A – Customized for each Progress Report Campaign)

Additional Blocks: Strategic Care

Alerts and Cases

Process Overview and Configuration Decisions

Information Sources that lead to Alerts:

- Progress Reports
- Student Interactions
- Attendance Records
- Notes from other faculty or staff
- Tutoring Reports

Faculty member, advisor, or other user notices a student may be at-risk based on an observation, interaction, or received information.

Submits an Early Alert.

Auto-assigned user receives the Alert

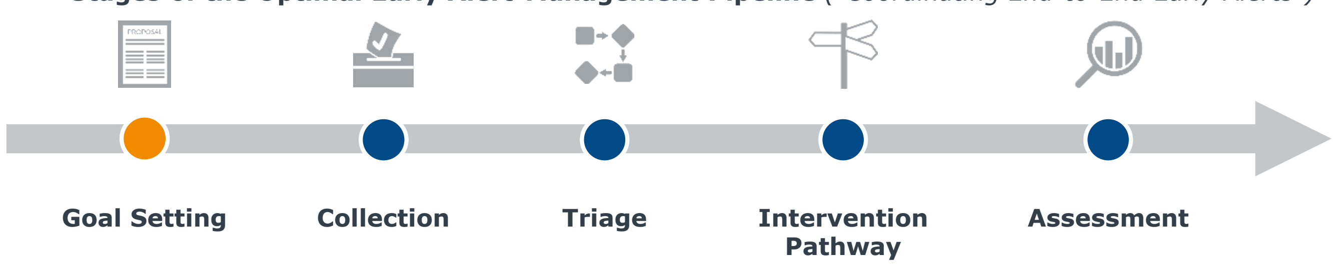
Case is created to manage the Alert

Action taken based on Alert context

Case is closed once follow-up complete

Initial Alert reporter informed of action steps and resolution

Stages of the Optimal Early Alert-Management Pipeline *("Coordinating End-to-End Early Alerts")*



Targeted Early-Alert Reasons:

- ✔ Streamline faculty decision-making process; avoid choice indecision
- ✔ Allow staff to match student with best intervention, support staff
- ✔ Improve ability to focus efforts
- ✔ Simplify impact analysis

Early-alert reasons should be **insightful, actionable, measurable**

Sample Early-Alert Reasons:

1. Assignment concern
2. Attendance concern
3. Student should seek tutoring
4. Student should withdraw from course
5. Student not paying attention or sleeping
6. Poor grades
7. More than academic issue

Additional Blocks: Strategic Care

Alerts and Cases

Configuration Decisions and Workflow Worksheet

Feature	Configurations	How should this be handled?
Basic Configurations (Admin → Group Settings)	**Cases Enabled:** when checked, the Cases module will be enabled and those users with Case Permission will be have access to the Cases tab. **When a Case is assigned, send an email:** when a case is assigned to an advisor, Navigate will automatically send them an email. *EAB Recommendation: Yes* **When a user is marked as owner of a case, send an email:** when a user has been assigned as the owner of a specific case, Navigate will automatically send them an email. *EAB Recommendation: Yes* **Send an email to the alert issuer when a case is closed:** automatically send an email to the person who originally issued the student alert when the case is marked closed. The **Email Text** box lets you create the personal email the alert issuer will receive. *EAB Recommendation: Yes*	Application Administrator to set up settings on the left if proceeding with cases

Alert A, B, C, etc. (Admin → Alert Reasons)	❑ Available in Progress Reports?
	❑ Alert triggers email?
	    ❑ All assigned Advisors
	    ❑ Coach
	    ❑ Student
	❑ Creates a Case? If so, assigned to who?
	    ❑ All assigned Advisors
	    ❑ Coach
	    ❑ Particular individual(s)?
		Discuss who is accountable for responding and handling this alert, how long a case should be open, reasons for closing case etc.

Case Outcomes (Admin → Case Outcomes)	Add possible case outcomes that will be used to close cases. You can run reports based on case outcomes. Examples: - Student has been helped - Support no longer needed - Student left institution	Are case outcomes clear?

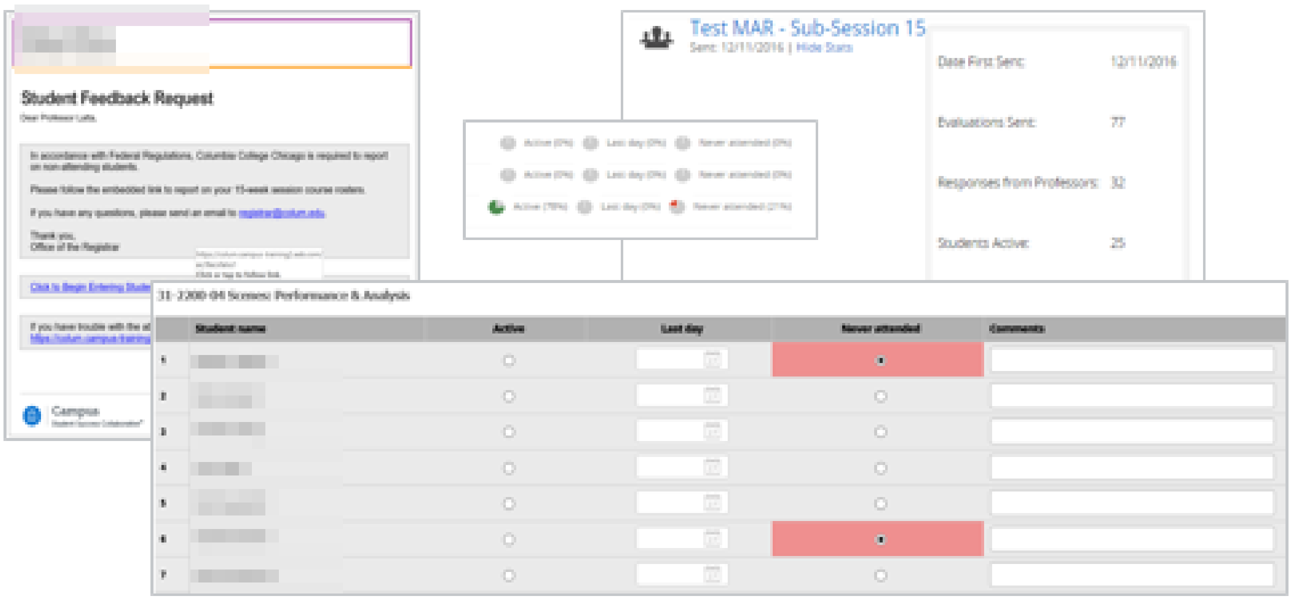
Which Alerts Should Generate Cases?

Cases help improve coordination between units, student experience, and tracking. However they are not always necessary. Considerations for early alert generated cases:

- **Do you have capacity to address all generated cases?** Only open cases that staff can address in a timely manner
- **Will follow-up likely involve multiple units?** Cases coordinate multiple points of contact in Navigate
- **Does actionable follow-up require direct contact with the student?** Do not open a case if you can directly send student relevant resources
- **Do you have use for reporting?** Do not open a case unless you have a specific use for data or reporting

Enrollment Census

Purpose: The purpose of an enrollment census campaign is to solicit feedback from faculty about the last day of attendance for a student.



User Role Permissions: Make sure you can enrollment campaign permissions enabled under the Campaign section of Permissions for the appropriate user role type.

Campaign Section

View Enrollment Census Campaign	Checking this option allows the user the ability to view the details of any enrollment census campaign
Enrollment Census Create	Allows for the creation of enrollment census campaigns
Enrollment Census Delete	Allows for the deletion of enrollment census campaigns. Please note that anything deleted in the system cannot be recovered.
Enrollment Census Reports	This option gives user access to the enrollment census campaign reports

Discussion Guidance

- How would you use this data? Would faculty be open to receiving this in addition to other requests?
- If you do it, what courses and students would you prioritize?

Additional Blocks: Strategic Care

Attendance

User Role Permissions: Make sure you can attendance permissions enabled under Athletics

Absence Recording	Allows for the recording of absences only for the students enrolled in their course
Absence Recording for all Students	Allows for the recording of absences for all students
Ad Hoc Attendances	Enables the user to fill out attendance for a meeting outside of the normal class schedule

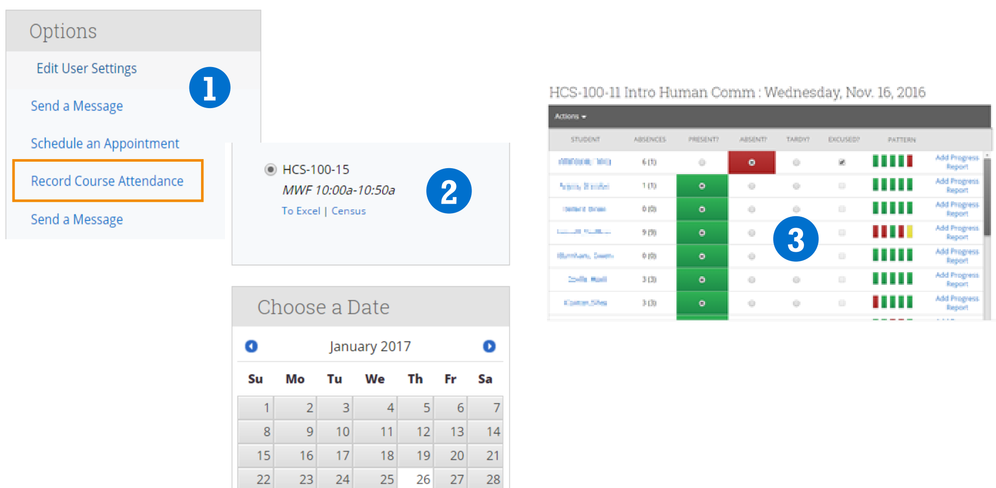
A Professor is able to track course attendance starting from the Professor Homepage.

Select "Record Attendance"

Select the course meeting that you want to track

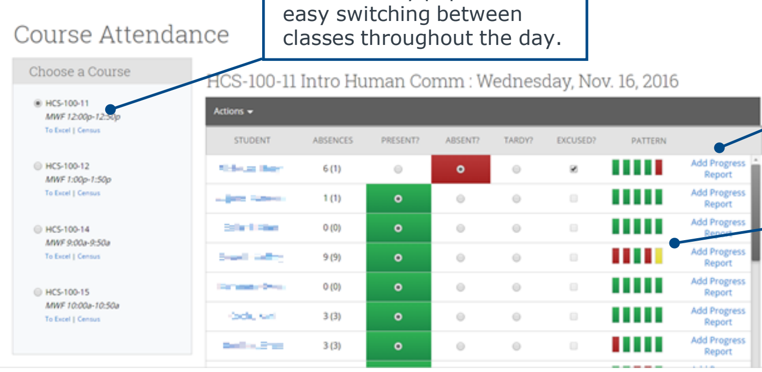
Denote absent, excused, and tardy students, and submit the rest as present

Go back and edit at any time!



Unpacking the Course Attendance Page

A professor's courses automatically populate for easy switching between classes throughout the day.



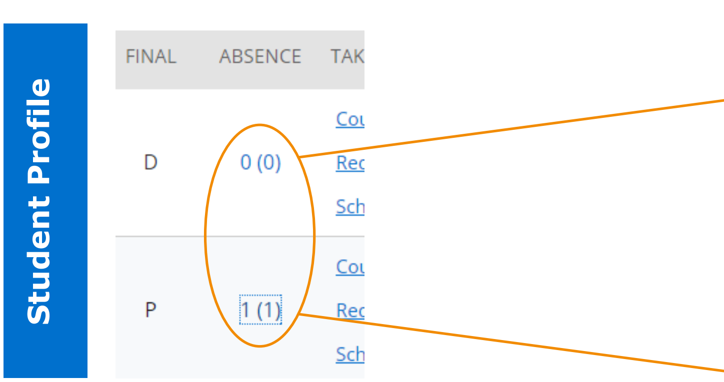
Seems like the student is in trouble? Submit a progress report!

The **Attendance Pattern** reflects the last five recorded attendances for this student for this class.

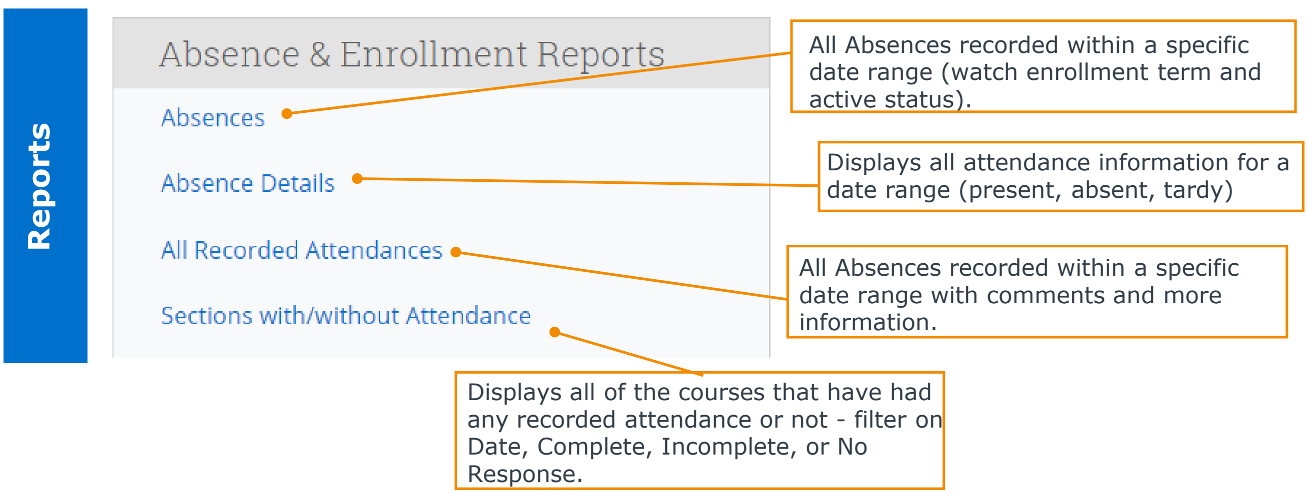
The **Absence Tracker** displays the total absences recorded this term compared to excused absences (in parenthesis)

Attendance

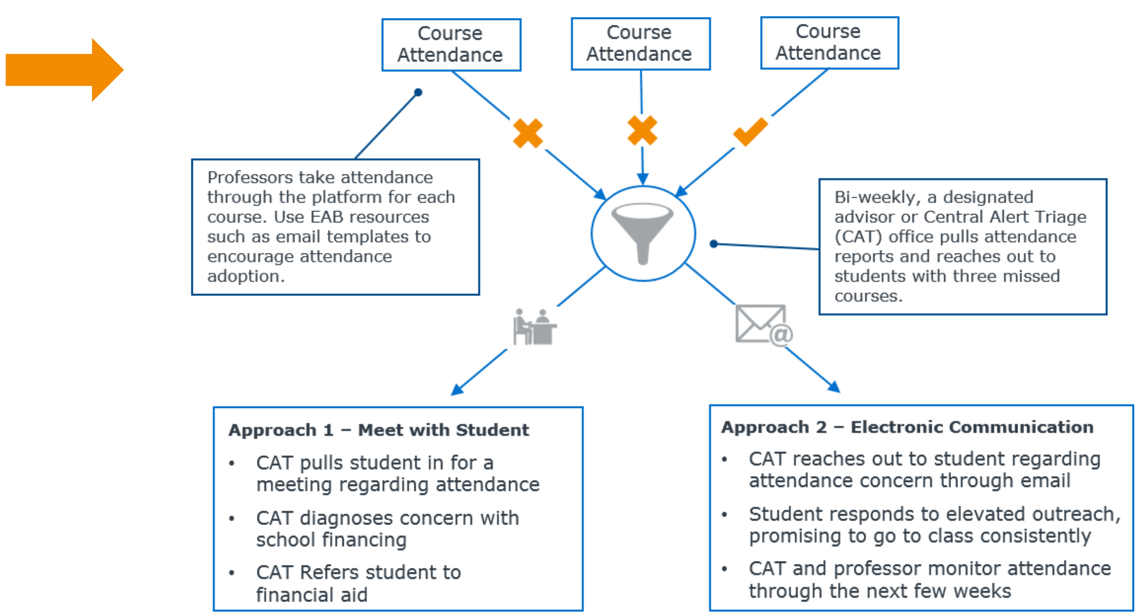
If professor tracks attendance, that information is housed in a variety of places in the platform:



DATE	PRESENT / ABSENT	EXCUSED?	COMMENT
08/30/2016 03:30 PM	Present	--	
09/13/2016 03:30 PM	Present	--	
09/20/2016 03:30 PM	Present	--	
09/27/2016 03:30 PM	Present	--	
10/04/2016 03:30 PM	Present	--	
10/11/2016 03:30 PM	Present	--	
10/25/2016 03:30 PM	Present	--	
11/15/2016 03:30 PM	Present	--	
11/29/2016 03:30 PM	Absent (1)	--	
12/06/2016 03:30 PM	Present	--	



Example Attendance Follow Up Process:



Additional Blocks: Strategic Care

Attendance

User Role Permissions: Make sure these permissions are enabled for relevant roles (recording and reporting)

Permission	Description
View Absence	Enables the user to view, but not edit, previously recorded classroom attendance
Record Attendance for Classes User is Instructing	Allows for the recording of absences only for the students enrolled in their course
Record Attendance for All Classes	Allows for the recording of absences for all students
Record Attendance for Days Class Is Not in Session	Enables the user to fill out attendance for a meeting outside of the normal class schedule
View Absences Report	This report shows a summary of all student absences in the platform within a date range.
View Recorded Attendances Report	Allows the user to run reports for recorded absences
View Sections With/Without Attendance Report	Allows the user to run reports for recorded absences

Other Settings: please review and edit these settings to set up the attendance tracking workflow

Permission	Description
Global Configurations	
Absence Email Templates	This setting enables custom Absence Email Templates once custom workflows have been set up with your Strategic Leader. *Checking this box alone does not enable absence email templates*.
Require Professor Signature on Attendance Submission	Checking this box forces all professors/faculty who record class attendance to sign their attendance. The text requesting the professor's signature becomes active when this box is checked. *EAB Default: No*
Professor Signature must match Professor's PIN	*EAB Default: No*
Error Message for signature to PIN mismatch	This error message is displayed when the signature check doesn't match. It should include some information on who to contact when the user's pin is incorrect.
Group Configurations	
Send an email to advisors when a student is reported absent from class	*EAB Recommendation: No*
Send an email to the student when they are reported absent from class	*EAB Recommendation: Yes*

Additional Blocks: Milestone Guidance

Special Population Content

To-Dos Creation Process

1. Create Special Populations To-Dos in **EAB's Content Administrative Tool (CAT)**. These to-dos should be specific to subpopulations of students that have a unique set of requirements and/or that may be high-risk.

2. Work with your Content Engagement Team to create and edit the language of selected To-Dos to reflect unique student experiences and requirements at your institution. Ensure all descriptions, contact information, and web links are accurate.

3. Hold brainstorming session in follow-up to fill in essential steps that are missing in given topic areas and to ensure that no steps are duplicative.

4. Check that content is digestible for students and includes a clear call to action. Proofread information in the workbook before uploading to the content management system.

Timeline

Continue editing and adding helpful content in Phase II of the Guide implementation process.

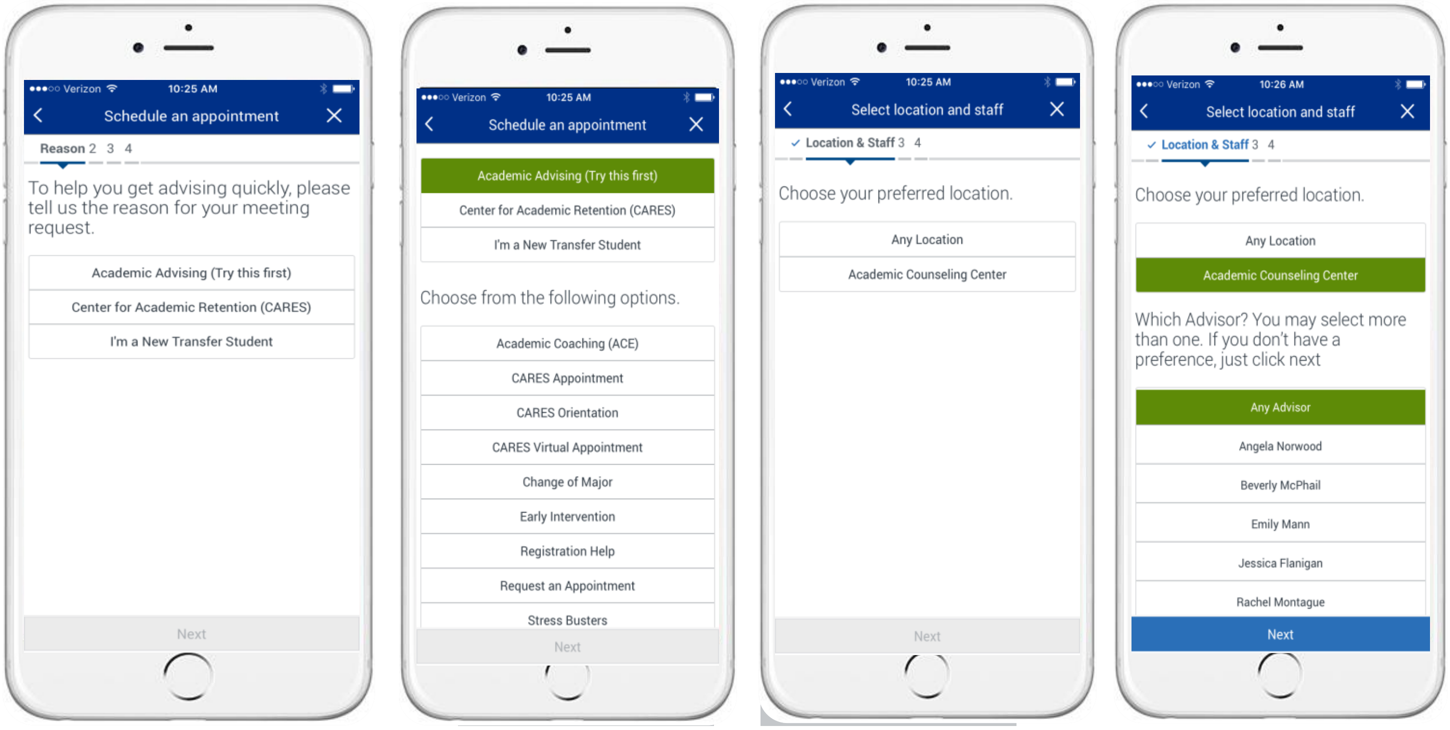
- We recommend getting started on To-Dos 3-4 months prior to Go-Live.
- Collecting the correct information, coordinate points, and creating in the content administrative tool should take about 4-8 weeks.
- Complete an audit of to-dos to determine which tasks to include for Go-Live prior to the launch onsite. Complete customization of to-dos at least one month before Go-Live.

Initial Build: Your consultant will add default content to the Content Administration Tool.

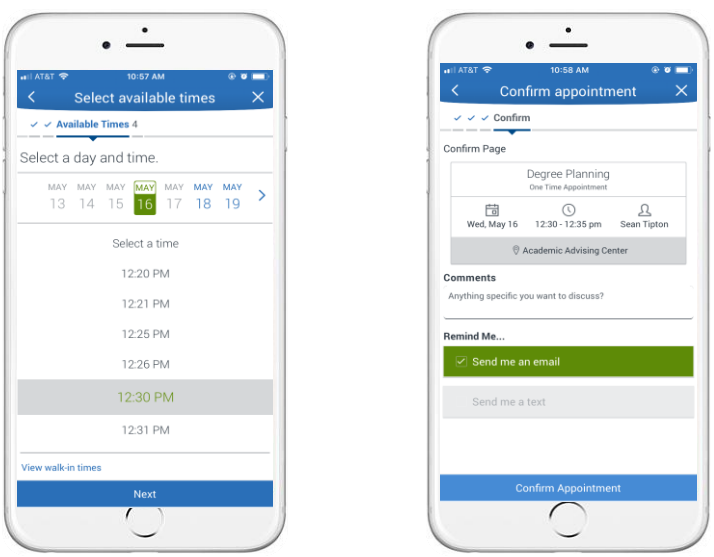
Recurring Edits: The Content Engagement Team is responsible for making periodic updates as new critical To-Dos become relevant. Do this throughout the semester in the CAT.

Additional Blocks: Milestone Guidance

Student-Initiated Appointment Scheduling



Students follow the workflow you set for each Care Unit.

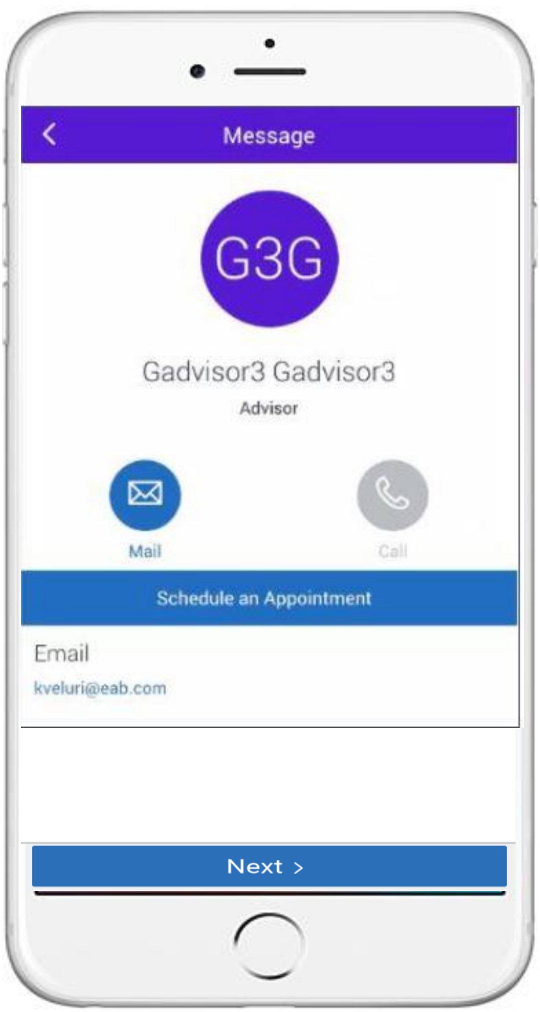


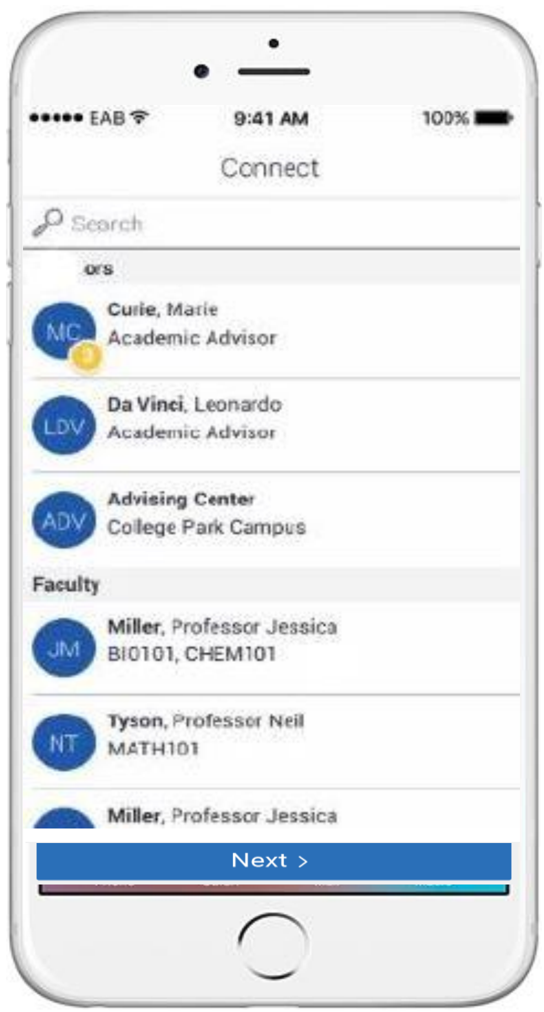
This is a **on/off toggle feature**. Please note that student-initiated appointment scheduling should only be rolled out after most advisors have entered availability in Campus.

If you are enabling a new care unit, please remember to think through the structure from the perspective of student scheduling.

Student Success Network

- Students can find the Success Network in the "People" section of the "Resources."
- Navigate can pull data from your institution's SIS so that students see their assigned advisors in the app.
- Students can contact members of their "Success Network" via phone number or email right from their mobile devices.
- Students are prompted to schedule an appointment
- Please connect with your dedicated consultant and business analyst to implement this feature- it is typically included in phase I or II of implementation.





EAB

EAB Athletics

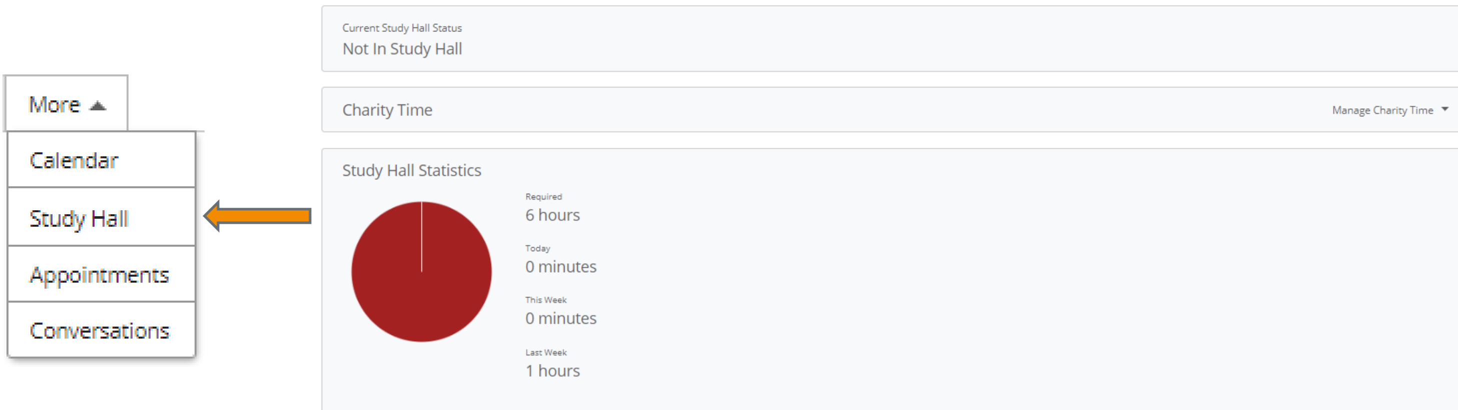
4

- Study Hall
- Travel Letters

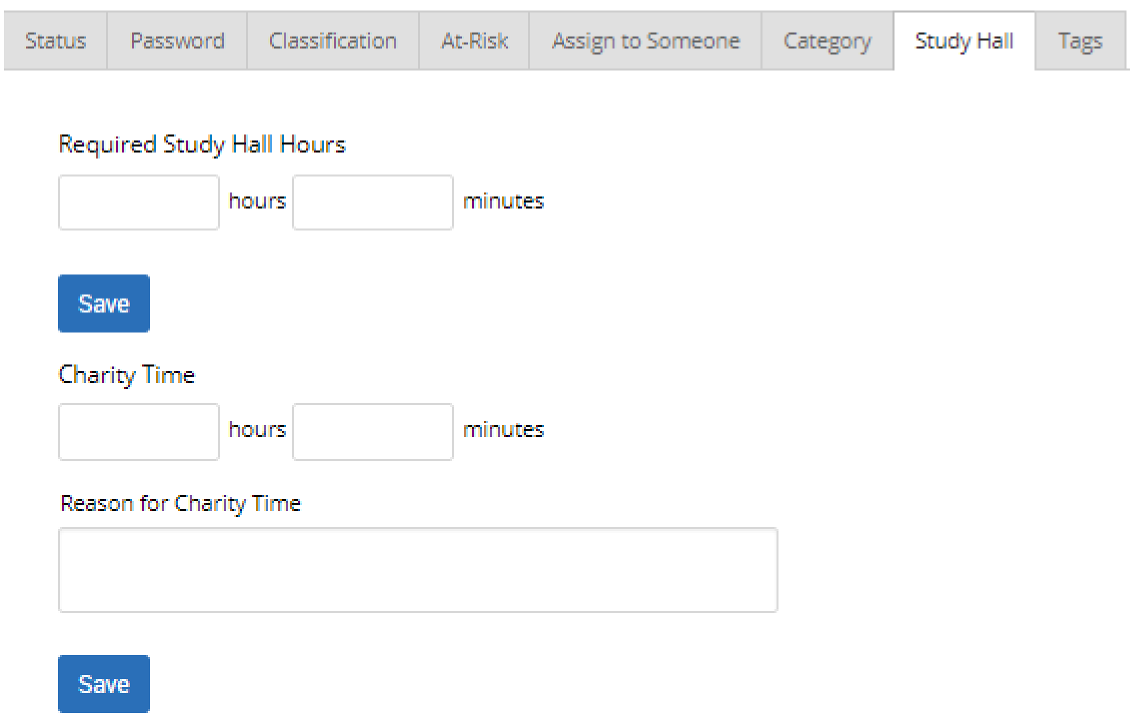
Study Hall

Study Hall is a user-assigned amount of time that a student is asked to satisfy within Navigate, Commonly, Student Athletes or students on probation will have a set amount of time they are required to be in things like a computer lab or tutoring. Study Hall can be used to track that.

You can see a student's Study Hall time by clicking on the **More** tab on the **Student Profile** and selecting **Study Hall:**



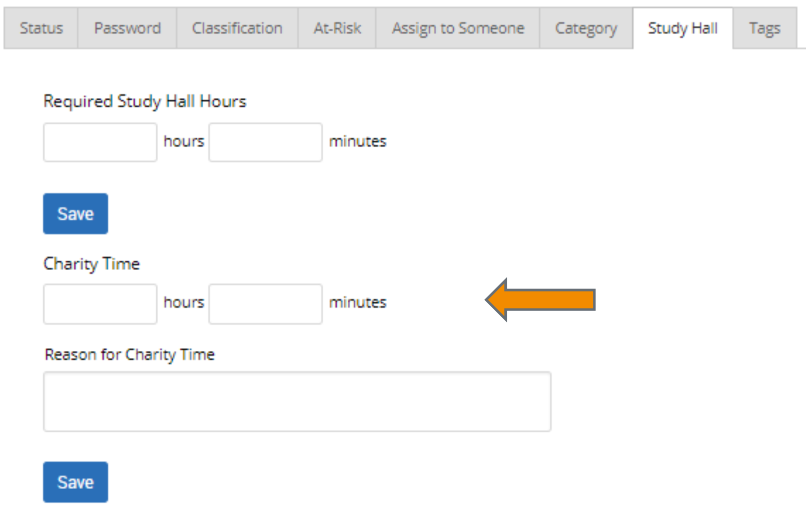
Assigning Study Hall time can be done through the **Mass Edit of Students** on your **Administration Tab:**



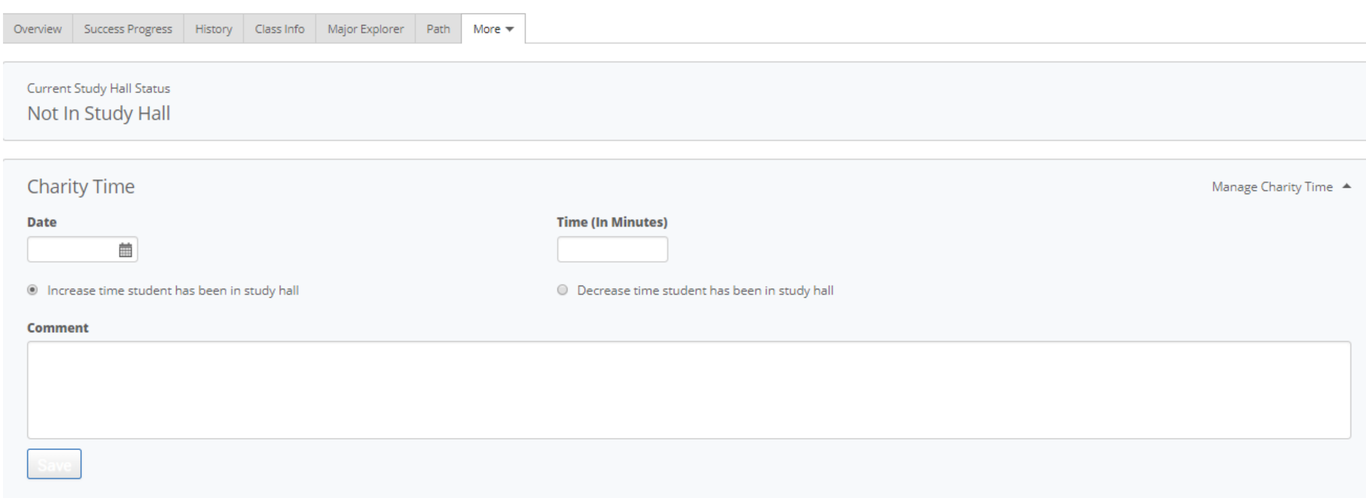
Study Hall, continued

Study Hall Calculations:

Charity time is when a user manually adds or removes time from a student's weekly required time. This can be done for a group of students form the **Mass Edit of Students**…

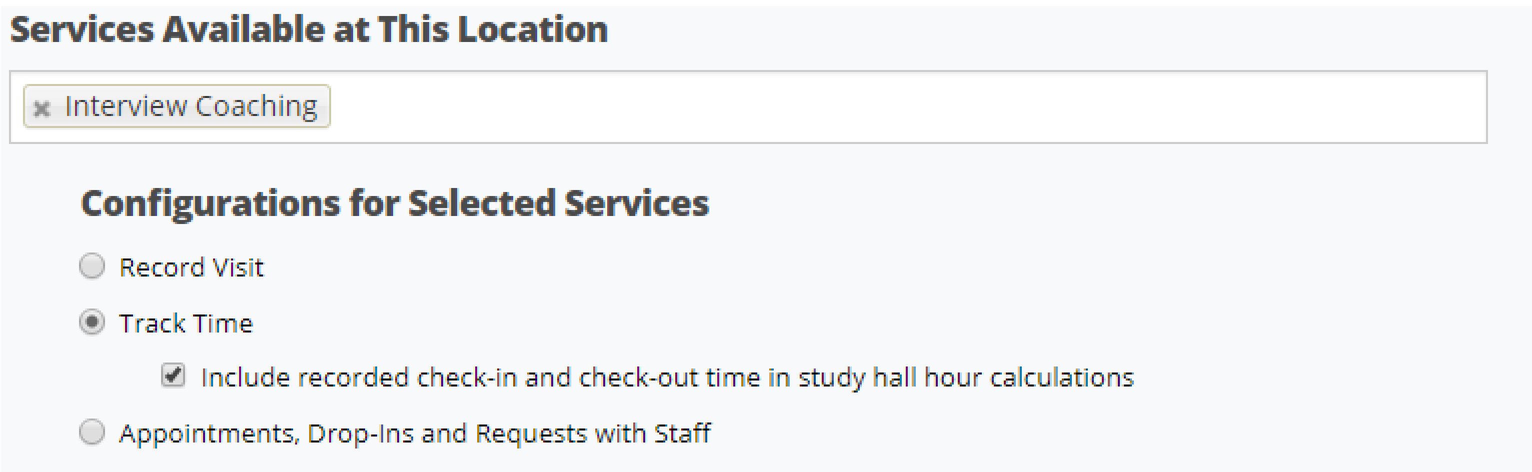


…Or on an individual student's page:



Study Hall, continued

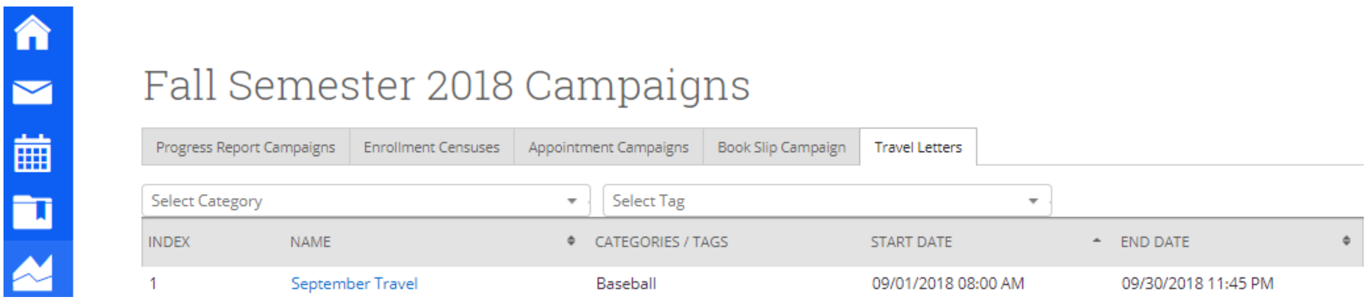
A student can also fulfill Study Hall requirements by swiping into a **Kiosk** for a **Service** that is configured to track their time as a part of their Study Hall calculations. This can be configured from your **Services** at the **Location** level in your **Administration Tab**:



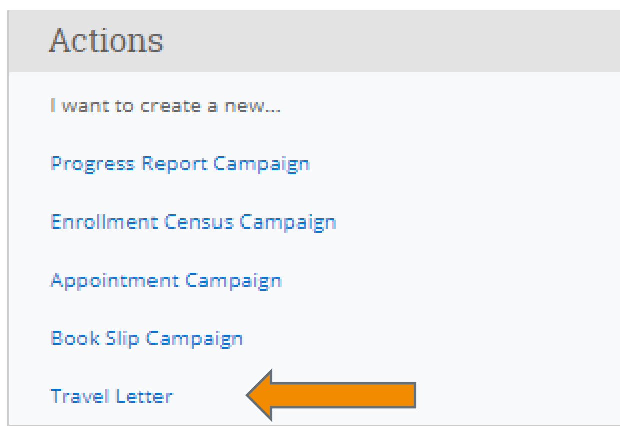
Travel Letters

Travel Letters allow for a Coach (or other user) to send an email to a **Professor** alerting them to a student's travel related to Athletic commitments.

Travel Letters can be accessed from the **Campaigns** tab and require **Athletics** features to be activated by your Consultant.

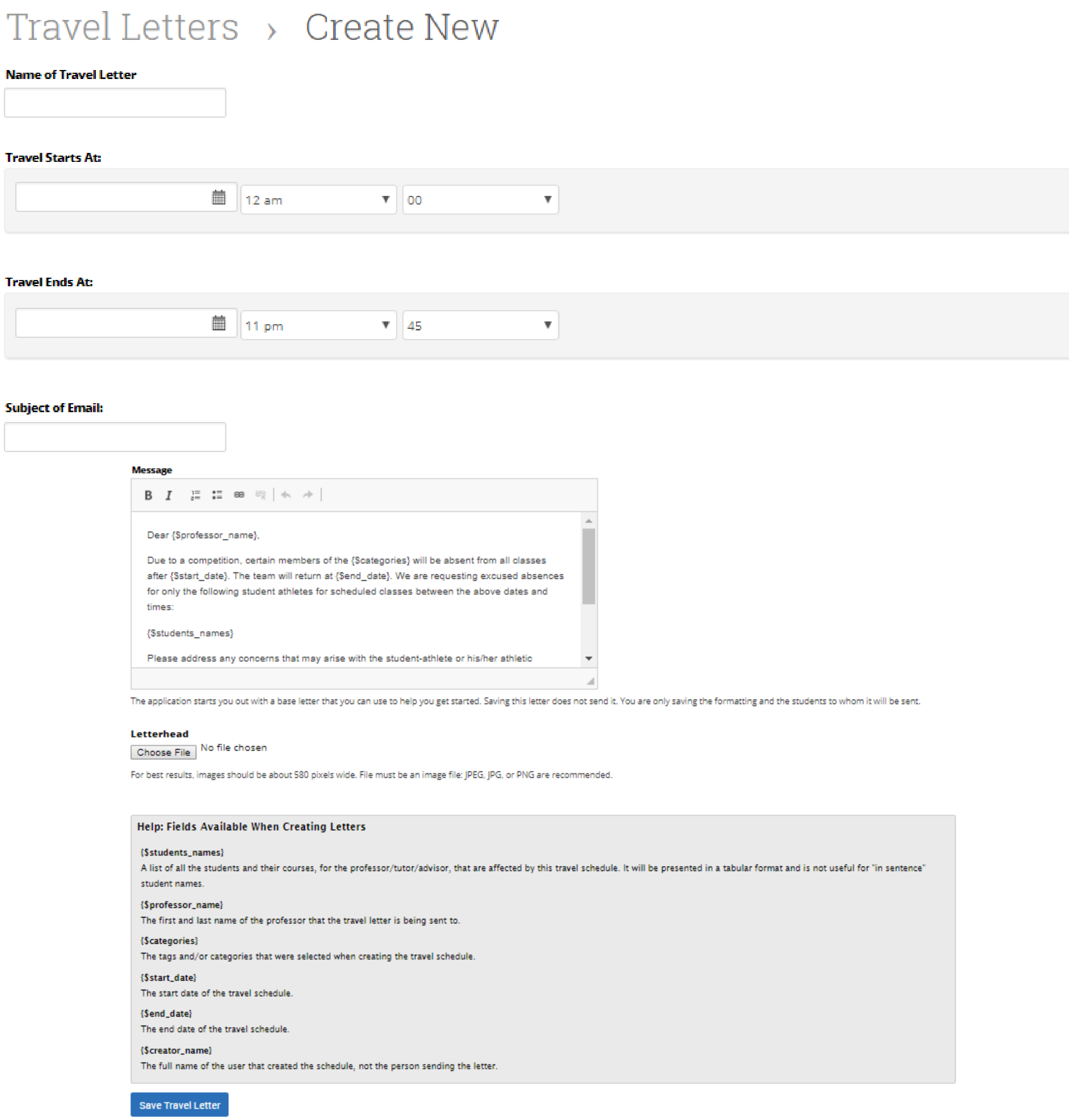


Start a new **Travel Letter** under **Actions**:



Travel Letters, continued

EAB Recommends you create a new Travel Letter for individual events, as opposed to, for example, and entire season. Follow the instructions to create the email Professors will receive:



Travel Letters, continued

To select students, use either a **Category** coming over from your SIS, a **Tag** that has been manually entered into your system, or you may select individual students from the **Search Bar**.

Find & Select Individual Students

Select Students From Tags

- Advising Self Assessment Completed
- Attended Convocation
- Attended Impact
- Attended Impact
- Attended Kickoff Experience
- Attended Online Orientation Summer 2018
- Attended Orientation
- Attended Orientation

Select Students From Categories

- Alpha Alpha Pi
- Baseball
- Basketball
- Debate team
- Drama Club
- Football
- Gymnastics

Once selected, click **Save Travel Letter**. However, **you are not done yet.** From the Travel Letter campaign page, select the Travel Letter you wish to send.

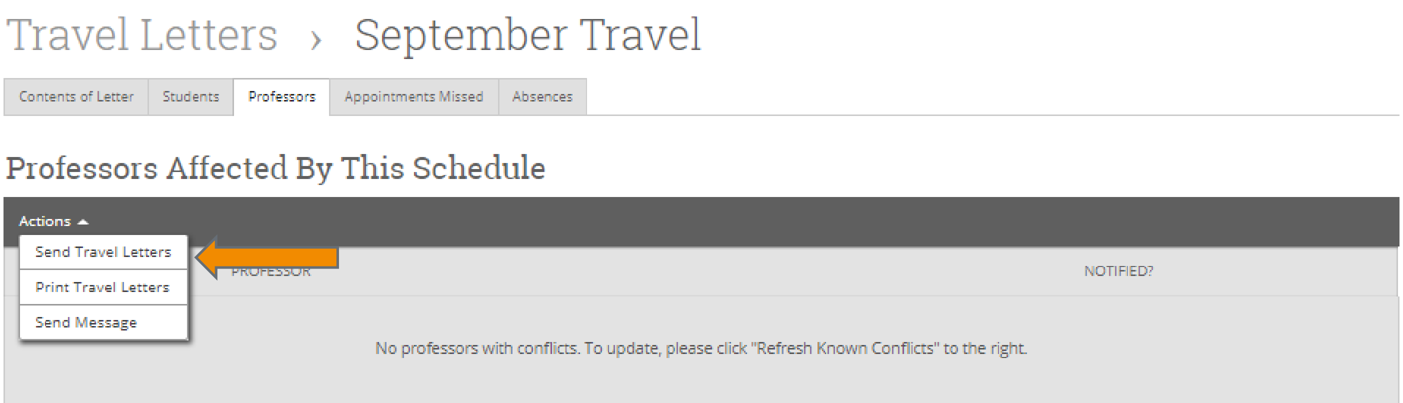
Progress Report Campaigns | Enrollment Censuses | Appointment Campaigns | Book Slip Campaign | Travel Letters

Select Category | Select Tag

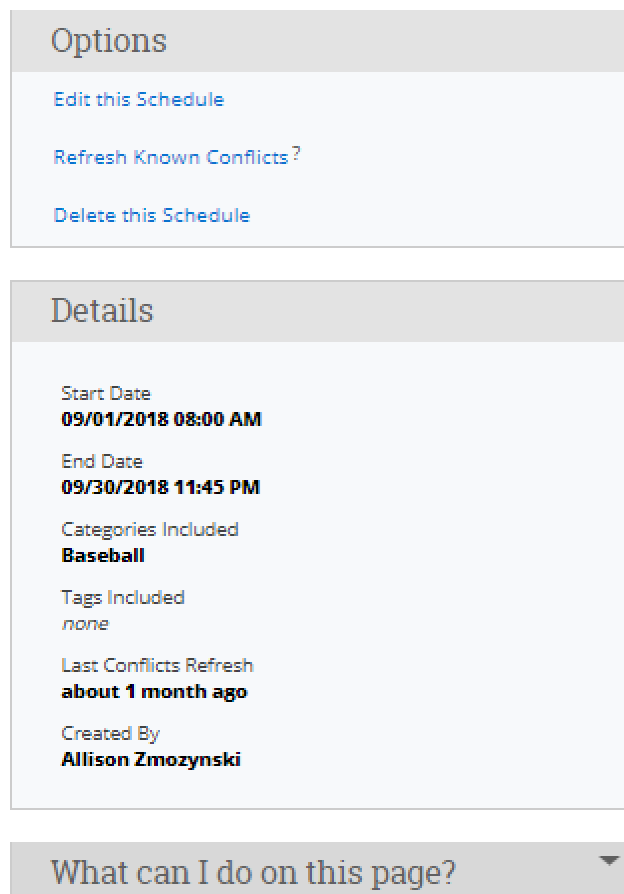
INDEX	NAME	CATEGORIES / TAGS	START DATE	END DATE
1	September Travel	Baseball	09/01/2018 08:00 AM	09/30/2018 11:45 PM
2	Baseball travel	Alpha Alpha Pi, Baseball, Basketball, Debate team, Drama Club, Football, Gymnastics, Honor Roll, International Student, Lacrosse, Pell Eligible, Rock Climbing Club, ROTC, Rugby, Swimming, Terrible Movie Club, Track and Field, Ultimate Frisbee, and Whitehurst Hikers	07/30/2018 10:00 AM	08/31/2018 11:45 PM
3	Super Bowl 52 Champs	Football	06/27/2018 12:00 AM	06/30/2018 11:45 PM

Travel Letters, continued

To send a Travel Letter, you must find the list of the Professors that are affected by the travel schedule, select **Actions**, and then select **Send Travel Letters**. Only then will Professors receive an email indicated in the **Contents of Letter** tab.



Once a Travel Letter has been sent, it's typically easiest to Edit an existing Travel Letter than it is to create a new one if a team or group of students has frequent travel.



EAB

Validation and Go-Live

5

- Staff Validation Exercise
- Student Validation Exercise
- Go-Live Support Structure

Staff – Practice Exercises & Workflow Validation

Quick Search Validation Points:

- ☐ Students and staff are populating when I type their names in the quick search.
- ☐ Student IDs are populating correctly under student names.

Advanced Search Validation Points:

- ☐ The names and ID numbers appearing in Advanced Search results are accurate.
- ☐ Practice Search: Run an Advanced Search with the below filters:
  - GPA between a 2.0 – 3.0
  - College: The College for which you advise
  - Enrollment status: Enrolled in the current term
  - Select 'My Students Only'
    - Navigate to 3 student profiles and confirm that these student profile match the criteria of the Advanced Search.

Saved Search Validation Points:

- ☐ I am able to create a saved search and navigate back to my Advisor Home to reference it later.
- ☐ I am able to save a Watch List and navigate to my Lists and Searches tab to reference it later.

Advisor Availability Validation Points:

- ☐ Locations are populating in the 'location' drop down.
- ☐ Student services are populating when I start typing in the Student Services box.
- ☐ I am able to set up my availability and save it.

Campus Calendar Validation Points:

- ☐ Courses are populating correctly on Student Calendars
  - Run an Advanced Search for students active for the term. Navigate to a student's 'Calendar' tab and note whether the dates and times of the courses are correctly displaying.

Staff – Practice Exercises & Workflow Validation

Appointment Campaign Validation Points:

- ☐ The location and the services for the campaign are populating correctly.
- ☐ The custom language included in the campaign is displaying correctly.
- ☐ I am able to search for the specific group of students I am interested in reaching out to and include them in the campaign.

Summary Report Validation Points:

- ☐ Details of the appointment (location, service, date and time of the appointment) are populating correctly on the left side of the Report
- ☐ The customized template for the advising report is correctly displaying.
- ☐ I am able to complete the report, add an attachment, and save it.
- ☐ Summary Report appears in the student's History or Reports/Notes tab after it has been saved.

Student – Validation Exercise

1. **Logging Into the app**

- ❑ Student can log into the app using single sign on username and password
- ❑ Student can complete the intake survey

2. **Exploring Features**

The functionality to test lives in the feature highlighted in orange

- ❑ Appointment Scheduling: Student can schedule an appointment
- ❑ Appointment Scheduling: Student can cancel an appointment*
  *These will be real appointments. Please be sure to cancel any appointments you schedule.
- ❑ Resources: "People" tab shows any associated advisor, coach, or professor
- ❑ Resources: "Places" tab shows a list of resources on campus
- ❑ Holds: Accurately displays any holds on student's account*
  *Hold data refreshes nightly.
- ❑ Class Schedule: Click dropdown on top to view enrolled courses for different terms. App displays schedule that accurately reflects courses student is currently enrolled in.
- ❑ My Major: Accurately displays student's current major if declared*
  *Students with multiple majors will only see one of declared majors
- ❑ My Major: Student can complete major explorer quiz

Please provide more information about any of the above features that did not work as expected:

____
____
____
____

Additional Comments:
Provide any additional comments about your experience with the app. Which features do you think you will use/will not use? What do you wish the app included?

____
____
____
____
____

EAB Go-Live – Where Should Users Go With Questions?

The Navigate Support Infrastructure

Leadership Team

Questions about student success initiative (overall), processes, policies, etc.

Examples:

- Should we run a college-wide campaign to support transfer degree planning?
- How can we share lessons learned and success across campus?

Contacts

- First Last name (email address)
- First Last name (email address)

Application Administrator

Questions about logging in, user access, permissions settings, site configurations, data discrepancies.

Examples:

- I forgot my password!
- Can I have access to the platform?
- Why can't I schedule an appointment at x location?
- Why don't I have access to x, when my colleague does?

Contacts

- First Last name (email, location, specialty)

Workflow & Training Team

Questions about platform functionality, technological protocols at your institution, and best practices for using SSC

Examples:

- How do I send a text message to a student?
- How do I create a work list for this campaign I'd like to run?

Contacts

- First Last name (email, location, specialty)
- First Last name (email, location, specialty)

Unsure who to ask?

- Email [insert school's inbox email address] to have your question directed to an expert!

The Navigate Support Infrastructure at EAB

Dedicated Consultant

Questions about strategy, risk modeling, data analysis and interpretation, EAB research, and future platform development

Examples:

- Do you have research on integrating career and academic advising?
- What types of campaigns have other SSC members used successfully?

Contacts

- First Last name (email) – Launch Consultant
- First Last name (email) – Strategic Lead

EAB Member Support

Experiencing site issues

Examples:

- When I click on X I get an error message. What is going on?

Contacts

- Navigatetechsupport@eab.com

EAB Go-Live – Issue Triage and Support from EAB

3 Phases of Our Partnership:

Providing Comprehensive Support and Coverage To Meet Your Needs

Go Live

Go-Live+45 Days

Phase 1
Implementation

Phase 2
*Post-Go Live Adjustment & Monitoring**

Phase 3
Value Stream

Evolving Support to Provide the Right Service and Team at the Right Time

<table>
<tr><td colspan="3">Strategic Leader</td></tr>
<tr><td>Launch Consultant</td><td>Launch Consultant</td><td rowspan="2">Member Support Team (All support requests and partners with our engineers and technical support team)</td></tr>
<tr><td>Technical Implementation Team</td><td>Technical Implementation Team

Member Support Team (Product Issues only)</td></tr>
</table>

Post Go-Live Adjustment & Monitoring

This is a critical stage of our partnership. With the Go-Live of any module it is expected that you will identify certain small changes or configuration adjustments based on the volume of users.

At 45 days post-Go-Live our team will then complete our technical transition to recurring support in order to better serve you for our continued partnership.

Introducing You to Our *Member Support Team*

Easily Accessible

- **24/7 Support**

  Full site support is provided during business hours (8:30am – 7:00pm EST). After hours support provides emergency and basic tier one access support services

- **Single Support Email**

  One email monitored by member support team eliminates need to worry about who to email NavigateTechSupport@eab.com

Transparent Communication

- **Consistent Response**

  Review and response within one business day

- **Ticket Visibility**

  Ticket status visibility through the platform Help Center

- **Regular Updates**

  Ticket updates provided every 7 days until the item is resolved.

Experienced and Responsive

- **Access to the Right Support**

  Tenured Member Support Analysts, Business Analysts, and Engineers who have worked across the entire membership, in both implementations and supporting end users

EAB Go-Live – Issue Triage and Support from EAB

What might an end user say?	What could this really mean?	What is our action step?
"It Doesn't Work"	• User needs to set something up differently	Provide direction on configuration adjustments (MST if small, Strategic Leader if larger change)
	• Users needs training on its intended function	Additional Training (Training Resources or Strategic Leader)
	• User error	Inform of error and direct to training resources (MST)
	• Data is incorrect	Technical Support (MST)
	• Product might have a bug	Bug (MST)
	• User doesn't like how something works	Enhancement Suggestion (MST)

Right Person for the Right Problem

EAB's team of engineers, member support, consulting, technical support, data science, etc. is here to serve you. **The more information the Application Administrator can provide in the issue tracker,** the better as it helps us get to the underlying issue and the right person to diagnose and potentially address it faster

Providing End User Support – Internal and EAB Support

Issue Triage

- Application Administrators to serve as first line of defense for training questions, platform/data issues, and enhancement ideas
- Create Navigate Support email address to centralize process

EAB Status Page

- Quick and easy access to view the status of the Campus platform via webpage
- Source of truth for up to the minute updates on the overall site's performance as well as individual components.

24/7 Member Support Team

- 6 weeks after Campus Go Live the Application Administrators will be given access to EAB's Member Support Team
- Provides guidance on concerns or questions and will triage product issues to EAB Development

Appendix

6

- Navigate Settings Definitions

Navigate: Additional Settings

Administration: Global Configurations

Setting	Setting Description	Decision
General Settings		
Show Dropped Courses	If checked, dropped courses will display on the student profile page. *EAB Recommendation: Yes*	
Send a Message Tab Name	N/A: Allows for customization of the 'Send a Message' tab on students' homepages. *EAB Default: Send a Message*	
Custom Advisor Relationship Name	This setting controls the default label for your advisor role. *EAB Recommendation: Advisor*	
Custom Tutor Relationship Name	This setting controls the default label for your tutor role. *EAB Recommendation: Tutor*	
Hide Staff in Kiosk during Conflicts	If this box is checked, then only staff with upcoming availabilities and no conflicts during a time the student has picked will appear in the Kiosk. Note that a 10 minute buffer time is built into this setting to ensure availability. *EAB Recommendation: Yes*	
Show only current term alerts on the Student Profile	Only alerts that have been issued within the current term will appear on the student profile. Otherwise, any alert ever issued for the student will appear. *EAB Recommendation: Yes*	
Track Usage	This setting enables Utilization tracking. *EAB Recommendation: Yes*	
GPA Display Precision	This setting controls the number of digits that display to the right of the decimal for GPAs. *EAB Default: 2*	
Allow inactive students to log into Kiosk	When this option is selected, currently inactive students can log into a kiosk. *EAB Default: No*	
Only Show Courses With Active Sections for Availabilities	If selected, and if you are using course-based services, only courses with active sections (e.g., that are currently being offered) will be displayed for appointment scheduling availability. *EAB Default: No*	
Deprioritize Student Profile for Users	If selected, users who have both the Student role and at least one other role (such as Tutor) will have the non-Student role's overview page displayed rather than the Student Profile. *EAB Recommendation: Yes*	
Predictive Model Type	Members may now select from six possible outcomes for the predictive model: term over term, year over year (fall-to-fall), and 4, 5, 6, 7 or ever graduation. Note that this **requires** model retraining and validation by Data Science prior to implementation. Simply changing the model type will not affect the current model.	

Navigate: Additional Settings

Administration: Global Configurations (cont.)

Setting	Setting Description	Decision
Student Scheduler Configuration section controls the general student scheduling set-up (independent of care unit)		
Get Assistance Button Text	This field controls what text is on the button to get help/make an appointment on the Student Home page. *EAB Default: Get Assistance*	
Step 1: Care Unit Selection Label	This field controls what text the student sees when they are choosing a care unit/appointment type. *EAB Default: What type of appointment would you like to schedule?*	
Communication Settings		
Email Footer Message	This message appears at the bottom of all emails sent from the platform. We encourage you to identify someone who may field questions from professors, students, and staff regarding the platform.	
Undeliverable Text Message Recipient	The person who will handle SMS messages sent to the application when it is not possible to determine the intended recipient	
Email delivery method	Deliver = send to real email address, reroute = send all emails to test address (next field) *EAB Training Recommendation: Should always be set to Reroute* *EAB PROD Recommendation: Deliver*	
Testing E-mail Address	In demo mode, all generated e-mails will be sent to this address.	
SMS delivery method	Deliver = text/call real phone number, reroute = send all texts/calls to test number below (next field) *EAB Training Recommendation: Should always be set to Reroute* *EAB PROD Recommendation: Deliver*	
Testing SMS Address:	In demo mode, all generated text messages will be sent to this phone number	
Custom Messages		
Timeout Message	This message appears when the timeout option is running in kiosks. *EAB Default: You have been inactive for some time, if you don't interact the system will log you out*	

Navigate: Additional Settings

Administration: Global Configurations (cont.)

Setting	Setting Description	Decision
Calendar Integration Configuration		
Add student ID to synced calendar appointments	When calendar appointments are synced with Gmail or Outlook, the student's ID will be included in the appointment details *EAB Recommendation: Yes*	
Add student name to synced calendar appointments	When calendar appointments are synced with Gmail or Outlook, the student's name will be included in the appointment details *EAB Recommendation: Yes*	
Add student phone number to synced calendar appointments	When calendar appointments are synced with Gmail or Outlook, the student's phone number will be included in the appointment details *EAB Recommendation: Yes*	
Add student name to the title of synced calendar appointments	When calendar appointments are synced with Gmail or Outlook, the student's name will be included in the appointment title *EAB Recommendation: Yes*	
Add student ID to the title of synced calendar appointments	When calendar appointments are synced with Gmail or Outlook, the student's ID will be included in the appointment title EAB *Recommendation: Yes*	
Search form fields section of Global Configuration lets you select which fields are available on the Advanced Search screen for your users. This should be done in consultation with your Strategic Leader and your administrative policies.		

Administration: Group Configuration

Setting	Setting Description	Decision
Miscellaneous Settings (please note Group Settings contains settings that are already included and reviewed in blocks that cover Alerts, Cases, Attendance and Progress Reports)		
Show Global At-Risk Field	This setting, if checked, lets group users see the Global At-Risk Field in the Student Profile EAB *Recommendation: No*	
Show Work Phone with User Info	If checked, this setting displays the user's work phone and user information on their user profile EAB *Recommendation: No*	
Default appointment duration for general appointments	This appointment time will only be used if the advisor and/or the location has not defined a general appointment duration of their own. *EAB Default: 30 mins*	
Show Pictures on People’s Profiles	EAB *Recommendation: Yes* (assuming student images are set to EAB)	

EAB

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