

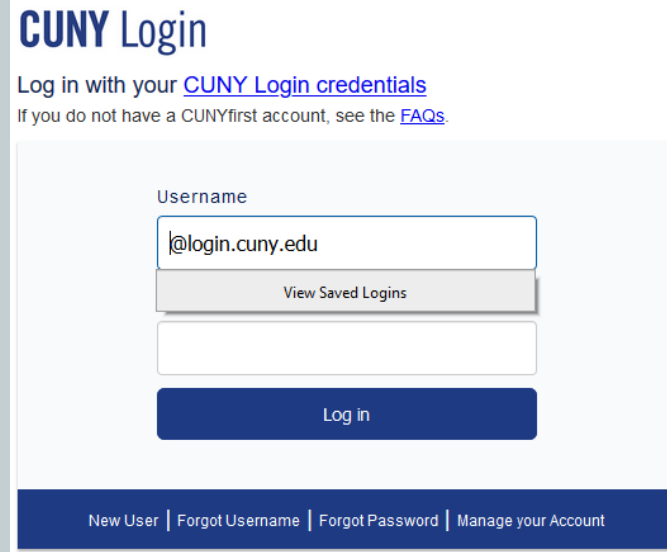


QC NAVIGATE FOR FACULTY ADVISING

Appointment Campaigns

GETTING READY

- INTERNET BROWSER: CHROME, MICROSOFT EDGE ARE BEST, FIREFOX also works well. Avoid Internet Explorer
- TEST YOUR CUNYfirst CREDENTIALS
 - Also known as: CUNY credentials, these are different from your QC credentials
 - QC Navigate credentials are the same as those you use for CUNYfirst
 - If you don't know these credentials or cannot remember the password, you have to go to the CUNYfirst log in page - <https://cunyfirst.cuny.edu> - to reset them
 - Your CUNY username is [firstname.lastnameXX@login.cuny.edu](https://cunyfirst.cuny.edu) (where XX are the last 2 digits of your CUNY ID (emplid)).



CUNY Login

Log in with your [CUNY Login credentials](#)
If you do not have a CUNYfirst account, see the [FAQs](#).

Username

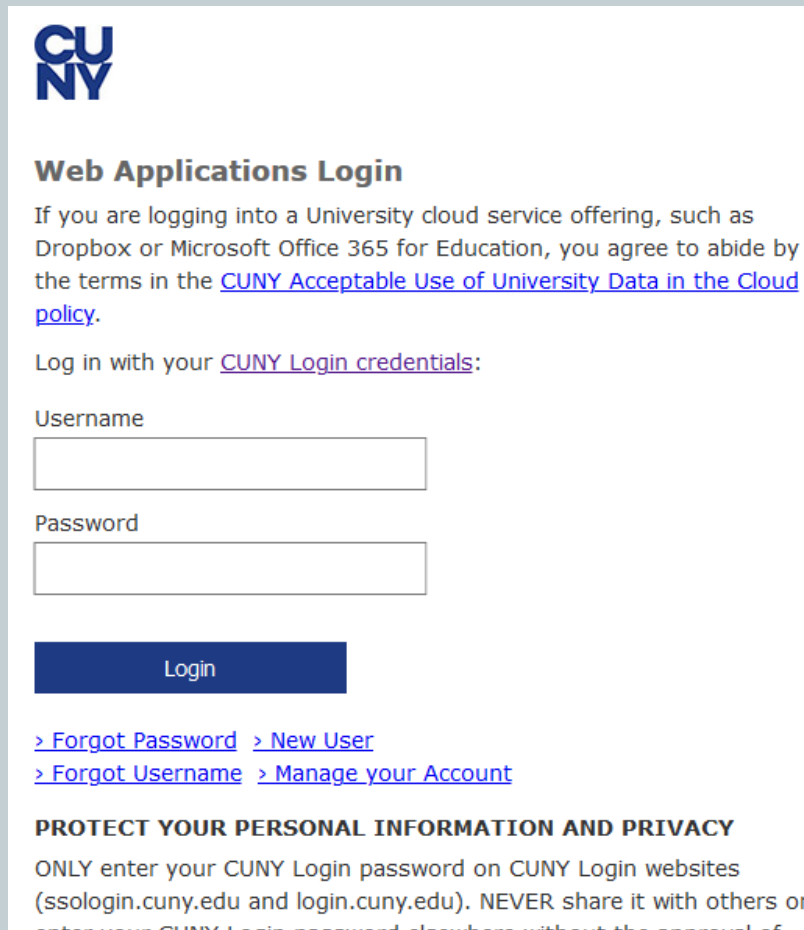
[View Saved Logins](#)

[Log in](#)

[New User](#) | [Forgot Username](#) | [Forgot Password](#) | [Manage your Account](#)

LOGGING IN TO QC NAVIGATE

- LOG IN PAGE: <https://qc-cuny.campus.eab.com/>
- Note that you do not need to type “@login.cuny.edu” – just [firstname.lastnameXX](#)



CUNY

Web Applications Login

If you are logging into a University cloud service offering, such as Dropbox or Microsoft Office 365 for Education, you agree to abide by the terms in the [CUNY Acceptable Use of University Data in the Cloud policy](#).

Log in with your [CUNY Login credentials](#):

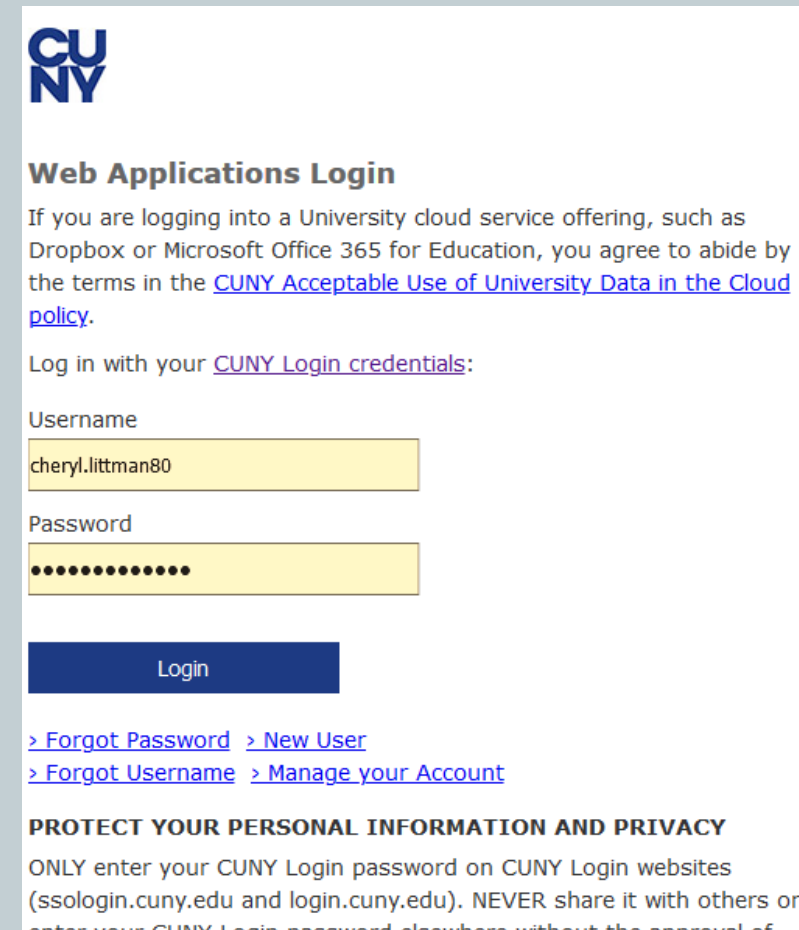
Username

Password

Login

[> Forgot Password](#) > [New User](#)
[> Forgot Username](#) > [Manage your Account](#)

PROTECT YOUR PERSONAL INFORMATION AND PRIVACY
ONLY enter your CUNY Login password on CUNY Login websites (ssologin.cuny.edu and login.cuny.edu). NEVER share it with others or enter your CUNY Login password elsewhere without the approval of



CUNY

Web Applications Login

If you are logging into a University cloud service offering, such as Dropbox or Microsoft Office 365 for Education, you agree to abide by the terms in the [CUNY Acceptable Use of University Data in the Cloud policy](#).

Log in with your [CUNY Login credentials](#):

Username

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Login

[> Forgot Password](#) > [New User](#)
[> Forgot Username](#) > [Manage your Account](#)

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QC NAVIGATE INFORMATION

<https://eab.qc.cuny.edu>

Tools Help

Interfolio U Higher Ed Cou Webinar: Safeg Quick Guides & About OSCQR COVID-19 Stud New Tab Web Login Service QC Navigat X

https://eab.qc.cuny.edu 67%

ISCHE Office 365 Teams OneNote Planner OneDrive SharePoint QC Nav Site Nav. CAT Nav. Prod Nav. Training Tableau Server OIRA Wiki

Home Team Events Help & Resources Student Site

QC Navigate Implementation

Log in to QC Navigate sites using your CUNYfirst credentials:
firstname.lastname-last 2 digits of your CUNY ID (you do not need a middle initial)
@login.cuny.edu

[QC Navigate \(Live Site\)](#)

[QC Navigate Training Site](#)

[Content Administration Tool](#)

Training Site Last Refreshed:
3/19/2020

What is QC Navigate?

QC Navigate is a predictive analytics and case-management tool that includes student-facing and faculty/advisor-facing components, to help students stay on track toward graduation through organized activities, communication, and tracking.

The platform, developed by [EAB](#) - an education technology services and research company with which CUNY has contracted - leverages historical institutional data to develop risk profiles for individual students and to provide analytics to guide advising and decision-making.

The Navigate platform can help staff and faculty identify students in need of support and steer them towards appropriate interventions. Faculty and professional advisors have the ability to add notes to a student's profile to ensure there is continuity from one session to the next and to communicate with other campus professionals serving the student. This coordinated care network helps manage significant caseloads more effectively.

- [Product overview](#) (4-page summary from EAB)

Intelligence ADMINISTRATORS FACULTY AND STAFF Strategic Care
Return on Education
STUDENTS Smart Guidance

PROTECTING STUDENTS' PRIVATE INFORMATION

- As with CUNYfirst, you have access to FERPA-protected information
- Be sure to keep student education information secure
- Read more here:
 - Federal FERPA policy: <https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html>
 - CUNY FERPA policy: <https://www.cuny.edu/wp-content/uploads/sites/4/page-assets/about/administration/offices/legal-affairs/policies-procedures/FERPA-2.pdf>

BEFORE YOU SET UP AN APPOINTMENT CAMPAIGN

I. SYNCHRONIZE YOUR (WORK) CALENDAR WITH THE NAVIGATE SYSTEM

1. TWO-WAY SYNC FOR OUTLOOK, GOOGLE OR OTHER CALENDAR
2. THIS IS ONE-TIME STEP
3. PREVENTS STUDENTS FROM SCHEDULING APPOINTMENTS AT A TIME WHEN YOU HAVE OTHER OBLIGATIONS/BLOCK ON YOUR CALENDAR
4. ASSURES THAT STUDENT APPOINTMENTS SHOW UP ON YOUR WORK CALENDARS SO YOU DON'T SCHEDULE OVER AN EXISTING APPOINTMENT WITH A STUDENT

TO SYNC YOUR CALENDAR USING OUTLOOK, SEE INSTRUCTIONS HERE:

<https://drive.google.com/file/d/1o66sy9REqyT9BC7WnboFrTsUr2Ad9SIU>

BEFORE YOU SET UP AN APPOINTMENT CAMPAIGN

2. SET UP AVAILABILITY

1. THIS WILL ESTABLISH THE DAYS AND TIMES THAT YOU ARE AVAILABLE FOR ADVISING (OR ACADEMIC SUPPORT) GENERALLY
2. NAVIGATE WILL PREVENT STUDENTS – WHETHER SETTING AN APPOINTMENT ON THEIR OWN OR VIA AN APPOINTMENT CAMPAIGN – FROM SCHEDULING OUTSIDE YOUR ESTABLISHED DATE/TIME PARAMETERS
3. YOU MAY SET UP MULTIPLE AVAILABILITIES AT ONCE, DEPENDING UPON THE COMBINATION OF DAYS AND TIMES YOU ARE AVAILABLE
4. FACULTY MEMBERS WILL SET UP NEW AVAILABILITIES PERIODCIALY, AT LEAST EVERY SEMESTER

SETTING AVAILABILITY

The screenshot shows the NAVIGATE Staff Home interface. At the top left is the NAVIGATE logo and navigation icons. At the top right is a search bar and a dropdown menu set to '2020 Spring'. The main content area is titled 'Staff Home' and contains a navigation bar with tabs: 'Professor Home', 'Appointments', 'My Availability', and 'Appointment Queues'. A callout box points to the 'Staff Home' title with the text: '1. Start from your **Staff Home** page (not your Professor Home)'. Below the navigation bar is a section titled 'My Assigned Students for 2020 Spring' with a dropdown arrow. Underneath is a table with columns: 'ALL', 'STUDENT NAME', 'ID', 'WATCH LIST', and 'CUMULATIVE GPA'. The table body contains the text 'No matching records found'. A second callout box points to the 'My Availability' tab with the text: '2. Select the My Availability tab'. On the right side of the page, there are three panels: 'Actions' with a link 'Issue an Alert', 'Quick Links' with links for 'School Information' and 'Appointment Campaigns', and 'Upcoming Appointments' with the text 'You have no upcoming appointments.' At the bottom left are 'Previous' and 'Next' buttons, and at the bottom right is '0 total results'.

SETTING AVAILABILITY

The screenshot shows the NAVIGATE Staff Home interface. At the top left is the NAVIGATE logo and navigation icons. A vertical sidebar on the left contains icons for Home, Mail, Calendar, Appointment, Reporting, and Search. The main content area has a 'Staff Home' header with a dropdown arrow. Below it are four tabs: 'Students', 'Upcoming Appointments', 'My Availability', and 'Appointment Queues'. The 'My Availability' tab is active, showing a section titled 'Available Times'. An 'Actions' dropdown menu is open, with 'Add Time' selected. A callout box points to the 'Add Time' option with the text: '3. Click on **Actions** and select **Add Time**.' Below the menu is a table with columns: 'DAYS OF WEEK', 'TIMES', 'DATES', 'LOCATION', 'PURPOSE', and 'CARE UNIT'. The table is currently empty, with a message below it: 'No available times have been listed. To add a time, click the "Add Time" button.'

NAVIGATE

Staff Home ▾

Students Upcoming Appointments **My Availability** Appointment Queues

Available Times

Actions ▾

- Add Time
- Copy Time
- Delete Time

DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
--------------	-------	-------	----------	---------	-----------

No available times have been listed.
To add a time, click the "Add Time" button.

Reporting

ADD AVAILABILITY

Top Section

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 9:00am To 3:00pm
All times listed are in Eastern Time (US & Canada).

How long is this availability active?
A Range of Dates

Starting on 04/13/2020 Ending on 05/08/2020

What type of availability is this?

Appointments Drop-ins Campaigns

Care Unit
Academic Advising

Location
Select Location

Services

Bottom Section

ADD AVAILABILITY

Location
QC Academic Department, Virtual/Online Appointment

Services
Academic Planning

URL / Phone Number
https://zoom.us/j/9999999999?pwd=XXXXXXXXXXXX

Special Instructions for Student

B I [List] [Link] [Undo] [Redo]

Put instructions for *all* students here.

- Formatting options are above.

UL - LI

Will you be meeting with multiple students?
These settings will not be used for kiosk and campaign purposes.

Max Number of Students per Appointment
1

Cancel Save

6. Location: Select **QC Academic Department, Virtual/Online Appointment** (When back on campus, you will select your own Department's Main Office)

7. Services: Select **Academic Planning**

8. URL/Phone is optional – provide either if you know how you'll meet with your students.

9. Provide any additional information for the students here. Students will see this when scheduling an appointment.

10. For individual meetings, leave the default as 1. Change for group appointments.

Remember to **SAVE** your availability. Create more availabilities, as needed.

1. Select the days of the week that you will be available, generally, for appointments with students.

2. Indicate the time range for these days. If you have different time ranges for different days, set an additional availability after you complete the first one.

3. Select **A Range of Dates** option, and then indicate the date range these days and times will be available. This can be for a single week, or several weeks, months, etc.

4. Type of Availability: Select only **Campaigns**

5. Care Unit: Select **Academic Advising**

SET UP AN APPOINTMENT CAMPAIGN
FOR STUDENTS IN YOUR PROGRAM
OR DEPARTMENT

“STAFF” HOME PAGE

The screenshot shows the NAVIGATE Staff Home page. At the top left is the NAVIGATE logo. The top right features a search bar with "2020 Spring" selected, a magnifying glass icon, and a notification bell with a red "1". A vertical sidebar on the left contains icons for Home, Mail, Calendar, Bookmarks, Campaigns (highlighted with a callout), Pins, Search, and a Plus sign. The main content area is titled "Staff Home" with a dropdown arrow. Below this are tabs for "Students", "Upcoming Appointments", "My Availability", and "Appointment Queues". The "Students" tab is active, showing "My Assigned Students for 2020 Spring" with a dropdown arrow. Below this is a table with columns: "ALL", "STUDENT NAME", "ID", "WATCH LIST", and "CUMULATIVE GPA". The table contains the text "No matching records found". A callout points to the Campaigns icon in the sidebar with the text "Select the Campaign icon." Another callout points to the "Staff Home" title with the text "Start from your Staff Home page (not your Professor Home)". On the right side, there are three panels: "Actions" with "I want to..." and "Issue an Alert"; "Quick Links" with "Take me to...", "School Information", "Download Center for Reports", "Campaigns...", and "Appointment Campaigns"; and "Upcoming Appointments" with "You have no upcoming appointments." At the bottom left are "Previous" and "Next" buttons, and at the bottom right is "0 total results".

NAVIGATE

2020 Spring

Staff Home

Start from your **Staff Home** page (not your Professor Home)

Students Upcoming Appointments My Availability Appointment Queues

My Assigned Students for 2020 Spring

Actions

I want to...
[Issue an Alert](#)

Quick Links

Take me to...
[School Information](#)
[Download Center for Reports](#)
Campaigns...
[Appointment Campaigns](#)

Upcoming Appointments

You have no upcoming appointments.

Previous Next

0 total results

Select the *Campaign* icon.



2020 Spring Campaigns



Progress Report Campaigns Appointment Campaigns

No progress report campaigns have been created for this term.

Actions

- I want to create a new...
- [Progress Report Campaign](#)
- [Appointment Campaign](#)

Select the "Appointment Campaign" link to start up a new campaign.

DEFINE THE CAMPAIGN

SIMILAR TO SETTING YOUR AVAILABILITY

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name:

TEST Faculty Advising Campaign

1. Enter a descriptive name for your campaign. Think about how to distinguish this from other campaigns you may run.

Care Unit:

Academic Advising

2. Care Unit: Select **Academic Advising**

Location:

QC Academic Department, Virtual/Online Appointment

3. Location: Select **Academic Department, Virtual/ Online Appointment**

Service:

Academic Planning

4. Service: Select **Academic Planning**

5. Enter the date range during which students can schedule advising sessions with you.

Begin Date:

04/13/2020

End Date:

04/30/2020

6. Select the number of appointments students can schedule during this period. Usually this is just 1 but you may allow multiple appointments for each student.

Appointment Limit:

1

7. Set the length of each appointment – this will influence the time slots available to students.

Appointment Length:

45 min

8. Create group appointments by entering a value greater than 1 – the number of students per appointment.

Slots Per Time:

1

Allow scheduling over courses

Selecting this option allows students to schedule an advising appointment with you even when the student would normally be “in class.”

< Back

Save and Exit

Continue

ADD STUDENTS TO THE CAMPAIGN

TEST Faculty Advising Campaign

Add Students To Campaign

Advanced Search

Saved Searches -

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Race, Watch List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Section Tag, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Section, Status

Assigned To

Goals & Interests Post Degree Goal, Favorites

Use **Advanced Search** to define the population of students you wish to include in the campaign. This could be for your Majors (use Area of Study) or for students who have taken a particular course (use Course Data). There are many ways to define your target population.

SELECT STUDENTS IN A PARTICULAR MAJOR OR MAJORS

Area of Study College/School, Degree, Concentration, Major

College/School (In Any of These)?

All

Major (In Any of these)?

× MHC Psychology & Neurosci BA

× MHC Psychology BA

× Neuroscience-Psychology BA

× Psychology BA

Major (In All of these)?

All

Major (In None of these)?

All

Concentration (In Any of These)?

All

Degree (In Any of These)?

All

Use the “Major In Any of These” field, in the **Area of Study** section of the search page to identify students in a single or set of majors.

Remember to select the Macaulay Honors College version of programs, as well.

Scroll down for the **Search** button

ADD STUDENTS

Add Students To Campaign

Advanced Search

Saved Searches -

Standard User Type: Majoring In: MHC Psychology & Neurosci BA, MHC Psychology BA, Neuroscience-Psychology BA, OR Psychology BA x

Search

Modify Search

A list of records that meet your search criteria will be returned.

Your search criteria is displayed here.

Select this link to select all values – when the search results return more than 1,000 students.

Actions -

Selected all 2653 items. [Clear Selection](#)

ALL

STUDENT NAME

ID

1

[Aarons, Shayna](#)

23600378

2

[Abaev, David](#)

23543370

3

[Abas, Reiaz](#)

23732262

4

[Abdelrahman, Mahmoud](#)

23177750

5

[Abdurakhmanov, Elana](#)

23812871

6

[Abeywardena, Nelusha](#)

23048921

7

[Abizadeh, Brandon](#)

23833152

8

[Abraham, Jason](#)

23673344

Previous

1

2

3

Next

Scroll down for the **Continue** button.

2,653 total results

Click here to select all values on the first page.

REVIEW STUDENTS

[Define Campaign](#) > [Review Students](#) > [Add Staff](#) > [Compose Message](#) > [Confirm & Send](#)

TEST Faculty Advising Campaign

Review Students In Campaign

Actions ▾	
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Aarons, Shayna
<input type="checkbox"/>	Abaev, David
<input type="checkbox"/>	Abas, Reiaz
<input type="checkbox"/>	Abdelrahman, Mahmoud
<input type="checkbox"/>	Abdurakhmanov, Elana
<input type="checkbox"/>	Abeywardena, Nelusha
<input type="checkbox"/>	Abizadeh, Brandon
<input type="checkbox"/>	Abraham, Jason
<input type="checkbox"/>	Abramov, Avner
<input type="checkbox"/>	Abramov, Daniella

Select any students you want to eliminate from the campaign. Then use the Action button to "Remove Selected Users."

Or just continue to include all students.

ADDING STAFF MEMBERS TO A CAMPAIGN



[Define Campaign](#) > [Review Students](#) > [Add Staff](#) > [Compose Message](#) > [Confirm & Send](#)

TEST Faculty Advising Campaign

Staff names will appear if availabilities have been set that coincide with the campaign timing.

Add Organizers To Campaign

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Karla Manning	For: Campaigns Mon, Wed 12:00pm-5:00pm EDT (April 11, 2020 - May 20, 2020)
<input checked="" type="checkbox"/>	Ashraf Shady	For: Campaigns Tue, Thu 1:30pm-5:00pm EDT (April 13, 2020 - April 30, 2020)
<input type="checkbox"/>	Theodore Kesler	For: Campaigns Tue, Thu 1:00pm-4:00pm EDT (April 20, 2020 - April 30, 2020)

Select the individuals involved in this Campaign. Often this will be just the person setting up the Campaign, but could include other advisors for the program.

[< Back](#)

[Save and Exit](#)

[Continue](#)

COMPOSE EMAIL MESSAGE



Compose Your Message

Provide an email subject line

{student_first_name}, Schedule an Academic Advising appointment

Insert a hyperlink.

Formatting ribbon

B *I* [List icons] [Link icon] Paragraph Merge Tags ↶ ↷

Please schedule your Academic Advising appointment.

Hello {student_first_name}:

Please schedule an appointment for Academic Planning at QC Academic Department, Virtual/Online Appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{schedule_link}

Thank you!

Use these tags to customize the email

Be sure to keep the Scheduling Link tag.

Available Merge Tags: ?

{student_first_name}
Inserts the student's first name

{student_last_name}
Inserts the student's last name

{schedule_link}
Inserts a link to schedule the appointment

Add Attachment:

Select file to attach



Attach a file, if desired

PREVIEW EMAIL

THIS IS WHAT THE STUDENTS WILL RECEIVE

Preview Email

Preview Landing Page

Andrew, Schedule An Academic Advising Appointment



Please Schedule Your Academic Advising Appointment.

Hello Andrew:

Please schedule an appointment for Academic Planning at QC Academic Department, Virtual/Online Appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.
<https://qc-cuny.campus.eab.com/a/123456>

Thank you!

Students can schedule an appointment by clicking on the “Schedule an Appointment” link.

< Back

Save and Exit

Continue

SCHEDULING LINK LANDING PAGE

THIS IS WHAT STUDENTS WILL SEE AFTER CLICKING THE “SCHEDULING LINK”

Preview Email

Preview Landing Page

Students will choose a day and time.

Students can write a comment that will be visible to the advisor on the appointment details.

Students will receive an appointment reminder notification by email.

Choose A Day

July 2014

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today

Choose A Time

Wed, Jul 09

3:50pm

4:00pm

4:10pm

4:20pm

4:30pm

4:40pm

Comments

Is there anything specific you would like to discuss?

Comments...

You will be sent an email reminder to the morning of your appointment.

Review Appointment Details

< Back

Save and Exit

Continue

CONFIRMATION PAGE



[Define Campaign](#) > [Review Students](#) > [Add Staff](#) > [Compose Message](#) > [Confirm & Send](#)

TEST Faculty Advising Campaign

Confirm & Send

Care Unit: Academic Advising

Location: QC Academic Department, Virtual/Online Appointment

Service: Academic Planning

Start Date: 04/13/2020

Appt Length: 45 minutes

Appt Limit: 1

End Date: 04/30/2020

Slots Per Time: 1

Organizer Attendee Reminders: E-mail SMS

Non Organizer Attendee Reminders: E-mail SMS

Subject {\$student_first_name}, Schedule an Academic Advising appointment

[Email Preview](#) [View](#)

Invitees: [View All \(2653\)](#)

Included organizers [View All \(2\)](#)

[< Back](#)

[Save and Exit](#)

[Send](#)

Use this page to confirm the details of your campaign before sending.

Advisors on the Campaign will receive email reminder notifications.

Students will receive text and email reminder notifications.

Preview the email

Click **Send** to send an email to all students on your Campaign list, or **Save and Exit** to review or revise later.

VIEW A LIST OF YOUR CAMPAIGNS



2020 Spring Campaigns

Progress Report Campaigns Appointment Campaigns

Filter by care unit: All care units ⓘ

View only my campaigns

NAME	STATS
 TEST Faculty Advising Campaign ACADEMIC ADVISING [unsent] 04/13/2020 - 04/30/2020	<input type="button" value="Resume"/> <input type="button" value="Delete"/>



Actions

- I want to create a new...
- [Progress Report Campaign](#)
- [Appointment Campaign](#)

THANK YOU

SEND ANY QUESTIONS TO:

- For faculty in the School of Arts and Humanities
 - Eva Fernández (eva.fernandez@qc.cuny.edu)
- For faculty in the School of Education
 - Jim Curry (james.curry@qc.cuny.edu)
- For faculty in the School of Mathematics and Natural Sciences
 - Cheryl Littman (cheryl.littman@qc.cuny.edu)
- For faculty in the School of Social Sciences
 - Esther VanSertima (esther.vansertima@qc.cuny.edu)
- All others
 - Suwen Brunot (suwen.brunot@qc.cuny.edu)