# FHSU Quick Start Guide for Navigate360

## GETTING STARTED

Log in to Navigate360 using your FHSU TigerNet ID and Password! You will receive a DUO authentication request.

Training site URL: https://fhsu.campus-training3.eab.com/ - available for training/practice only. No emails will be sent out to students.

**PRODUCTION SITE URL:** https://fhsu.campus.eab.com/

## KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communicate With, and Support Students

- **Reference the Student Profile –** After clicking on a student's name through the search results, your Staff Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student's profile
- **Issue an Alert** Complete a Progress survey or initiate Alert interventions. Staff will intervene based on level of interventions – see *Appendix A*

## OPTIONAL PLATFORM FEATURES

Available once the student-facing Navigate 360 app goes live.

- Appointment Scheduling, Sync your Outlook Calendar and create a Personal Availability Link (PAL). – see Appendix B
- Add Appointment Summary Notes – See Appendix C

## QUESTIONS

Contact the Navigate 360 platform administrators. Email Navigate360@fhsu.edu

# Navigate 360 Example Student Profile – Professor View

FORT HAYS STATE UNIVERSITY

Navigate360 | STUDENT SUCCESS

MC

## Jeremiah C[redacted]

FORT HAYS STATE UNIVERSITY

Overview | Courses | More

### Overview

**Music (Music Education) - BM**
Bachelor of Music
Music & Theatre

**Other Major(s)**
**Secondary Education (Pre-Secondary Education) - BS in Ed**
Bachelor of Music
Teacher Education

**Student ID**
[redacted]

**Classification**
Freshman

**Most Recent Enrollment**
None

### Options

I want to...

Message Student

Add a Note on this Student

Report on Appointment

Schedule an Appointment

Add to Student List

Issue an Alert

### Tags

### Staff Alerts

### Courses

Term: Fall Semester 2024 (D...

Actions

| | COURSE | PROFESSOR | DAYS/TIMES | MID | FINAL |
|---|---|---|---|---|---|
| ☐ | ART-300-B-Laboratory Elementary Art Methods | Brian Hutchinson | **Begins on 08/19/2024**<br>08/19/2024 - 12/13/2024<br>TR 12:00pm - 12:50pm CT<br>AD_225 | | |
| ☐ | HIST-111-A-Lecture Modern World Civilization | Gregory Atkins | **Begins on 08/19/2024**<br>08/19/2024 - 12/13/2024<br>MWF 8:30am - 9:20am CT<br>RH_153 | | |
| ☐ | MATH-250-G-Lecture Elements of Statistics | Jeffrey Sadler | **Begins on 08/19/2024**<br>08/19/2024 - 12/13/2024<br>TR 1:30pm - 2:45pm CT<br>RH_122 | | |
| ☐ | PHYS-103-B-Laboratory Physical Science Laboratory | Kent Rohleder | **Begins on 08/19/2024**<br>08/19/2024 - 12/13/2024<br>T 8:30am - 10:20am CT<br>TH_209 | | |
| ☐ | PHYS-208-VA-Lecture Elementary Meteorology | Gavin Buffington | | | |
| | | | **Begins on 08/19/2024** | | |

### Term Details

Fall Semester 2024

| | | | |
|---|---|---|---|
| -- (2) | ART300\|L... | Elementary Art Methods | Regi |
| -- (3) | HIST111\|L... | Modern World Civilizati... | Regi |
| -- (3) | MATH250\|... | Elements of Statistics | Regi |
| -- (1) | PHYS103\|... | Physical Science Labor... | Regi |
| -- (3) | PHYS208\|... | Elementary Meteorology | Regi |
| -- (3) | PHYS309\|... | Descriptive Astronomy | Unre |
| -- (3) | TEEL202\|L... | Foundations of Educati... | Regi |
| -- (1) | UNIV101\|L... | Freshman Seminar | Regi |

Term at a glance:
Credits: -
Credit Comp %: -
Term GPA: 0.0
Cum GPA: 0.0
Academic Standing:

Pre-Enrollment and Progression

High School Cum GPA: 3.7

High School: Republic County High School

### Your Success Team

Edwards, Derek
Advisor

Your Fall Semester 2024 instructors

Hutchinson, Brian
ART-300 (B)

Atkins, Gregory
HIST-111 (A)

Sadler, Jeffrey
MATH-250 (G)

Rohleder, Kent
PHYS-103 (B)

### Student Info

Student ID: A000000

Age: 100

DOB: 01/01/1902

Address:

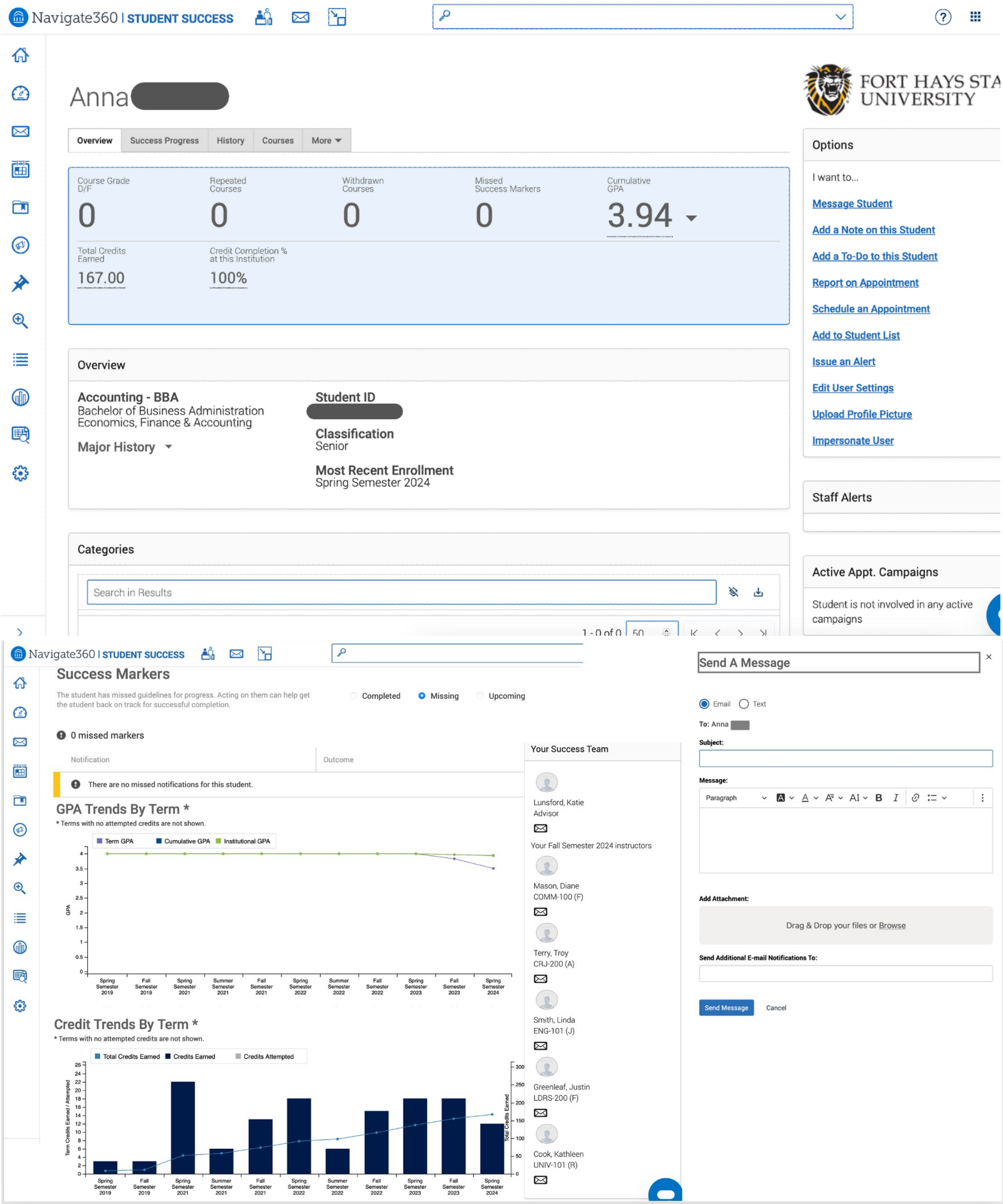
600 Park St.
Hays, KS 67601

Email: victoretiger@mail.fhsu.edu

Home: (785) 628-4201

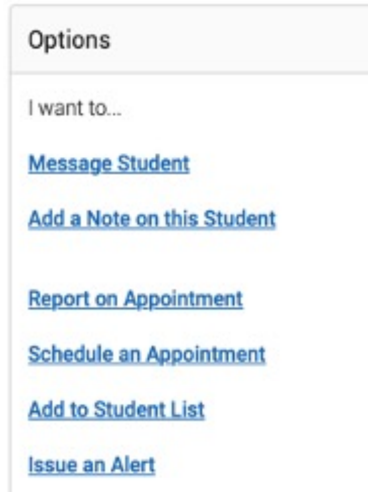
Cell: (785) 628-FHSU

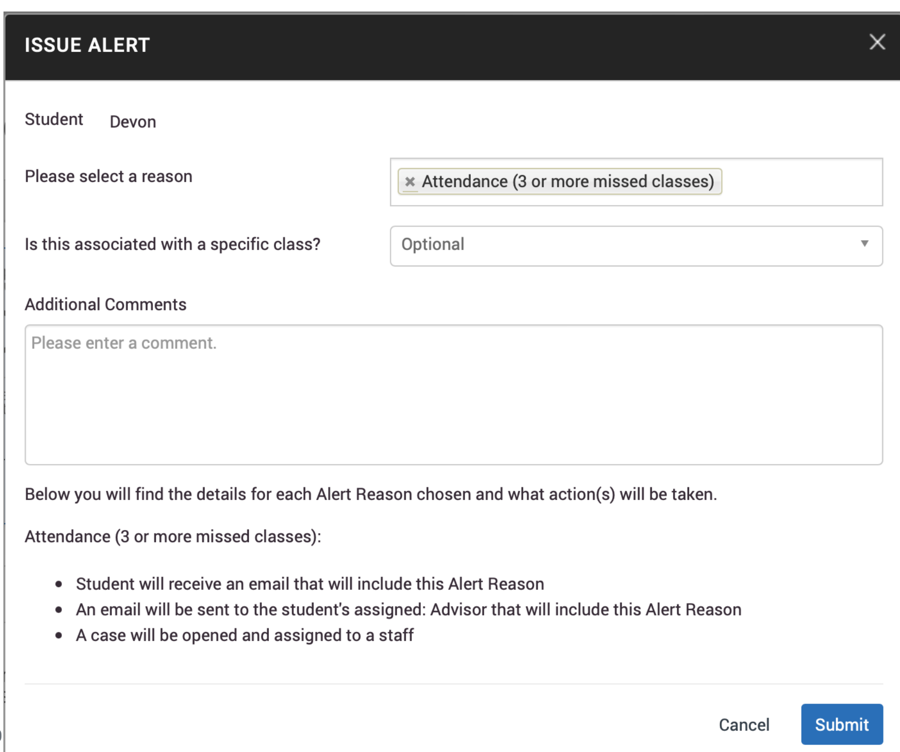
# Navigate 360 Example Student Profile – Advisor View



# Navigate 360 Student Profile Options

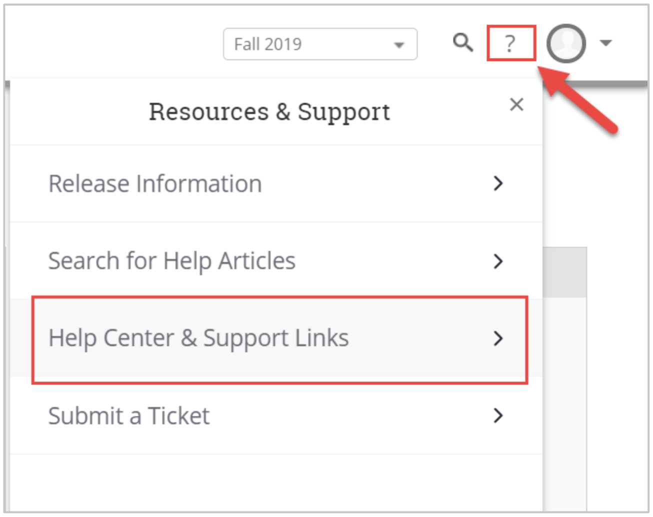
- **Message a Student –** After clicking on a student's name through the search results, your Staff Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student's profile.
- **Add a Note on this Student -** Notes can be used to record information related to a student profile and are not tied to specific appointments. Use this to jot down information about a student to collaborate across offices/care units.
- **Report on Appointment -** Appointment Summaries let you document information about specific student appointments. This can be utilized for scheduled or drop-in appointments.
- **Schedule an Appointment –** This allows you to schedule an appointment with a student. After completing the meeting information (location, organizer, length, etc.) You can also select the reminders that need to be sent to the student.
- **Add to Student List -** make a saved list of a group of students that you can then use in different areas across the platform. This could include a group of students an organization or departmental students you want to communicate with. For more information visit: [Student Lists Help Center]
- **Issue an Alert -** You can issue an alert for a student two different ways in Navigate 360; ad hoc or through a Progress Report Campaign. Select the alert reason, associated courses, and add additional comments. Faculty/Staff will see details for the alert reason and what action will be taken. Additional information is located in Appendix A.



# Need Help?  Access EAB's Help Center

Visit the Navigate360 Help Center for articles and how-to instructions on all Navigate360 Features and Workflows.



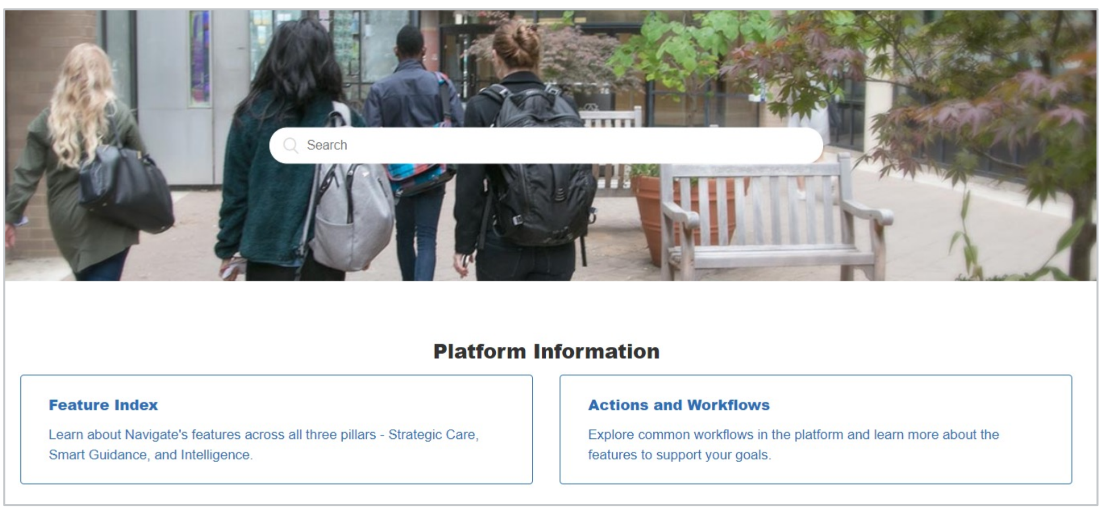

### Accessing the Help Center -

**Step 1:** Log in to Navigate360

**Step 2:** Click on the question mark icon in the top right hand corner.

**Step 3:** Click Help Center & Support Links from the drop down menu

**Step 4:** Select Help Center to be taken to articles and step by step instructions for Navigate360 features and workflows. View the Help Center Overview Video to get the most from its resources!




**Tip:**
Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)

**For more detailed guidance, check out the Help Center!**

## Additional Questions?

## Email Navigate360@fhsu.edu for support!

# Appendix A: Create a Progress Report or Issue an Alert

## Submitting a Progress Report

Navigate360's Progress Report feature is used by faculty to share critical academic information on students enrolled in their courses. Use the instructions below to submit a Progress Report and mobilize support for a student.

**Step 1:** Access the Progress Reports either directly from the request email or by logging in to the Navigate360 platform and toggling to the Professor home page. You will see a Gold Banner.

**Step 2:** Click "Fill out Progress Report" from email or Professor home page.

**Step 3:** In the feedback screen, you will see a list of course sections and students that feedback is being requested for.

**Step 4:** If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. If possible, please fill out the remaining columns, including the comments section with additional details. However, only the alert reason is required to submit.

**Step 5:** When submitting your Progress Reports, you have the option to submit only the students you have filled out feedback for or to submit all students. If you choose to submit all students, the students who you have not filled out feedback for will be marked as "I do not have feedback about this student."

### Student Feedback

**Your information is secure.**
Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.
Thank you!

**Professor Cook:**
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.

UNIV-101-R-Lecture Freshman Seminar

| | Student Name | Do you have feedback on this student's course performance? | Alert Reasons (You must choose at-least one if the student is at risk) | How Many Absences? | Current Grade | Comments |
|---|---|---|---|---|---|---|
| 1 | , Conrad | Yes / No | Alert Reasons | | | |
| 2 | , Kenli | Yes / No | Alert Reasons | | | |
| 3 | , Hailey | Yes / No | Alert Reasons | | | |
| 4 | , Katelyn | Yes / No | Alert Reasons | | | |
| 5 | Nolan | Yes / No | Alert Reasons | | | |

**Submit only marked students (but I'm not done)**

This button will submit students you have marked as being complete (effectively removing them from your list of students). H
email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have bee

**Submit unmarked students as not At-Risk (I'm all done)**

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 y
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-ris
progress report campaign.

**TIP**: Use the glossary of Alert Reasons on page 9 to understand what follow-up action will be associated with each Alert Reason.

**For more detailed guidance, check out the Help Center!**

# Appendix A: Complete a Progress Report or Issue an Alert

## Submitting an Ad-Hoc Alert

Navigate360's ad hoc alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student.

**Step 1:** Click the "Issue an Alert" link in the upper right-hand corner of your home page.

**Step 2:** Search for the student for whom you'd like to issue an alert (using name or ID).

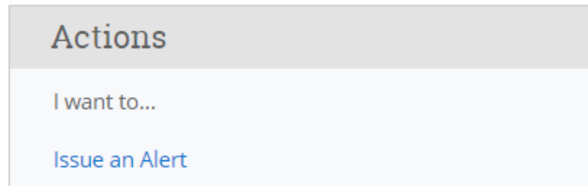
**Step 3:** Select the reason(s) you believe the student needs assistance. The reason(s) you choose will connect the student with the appropriate office. See more details

on the specific alert reasons below.

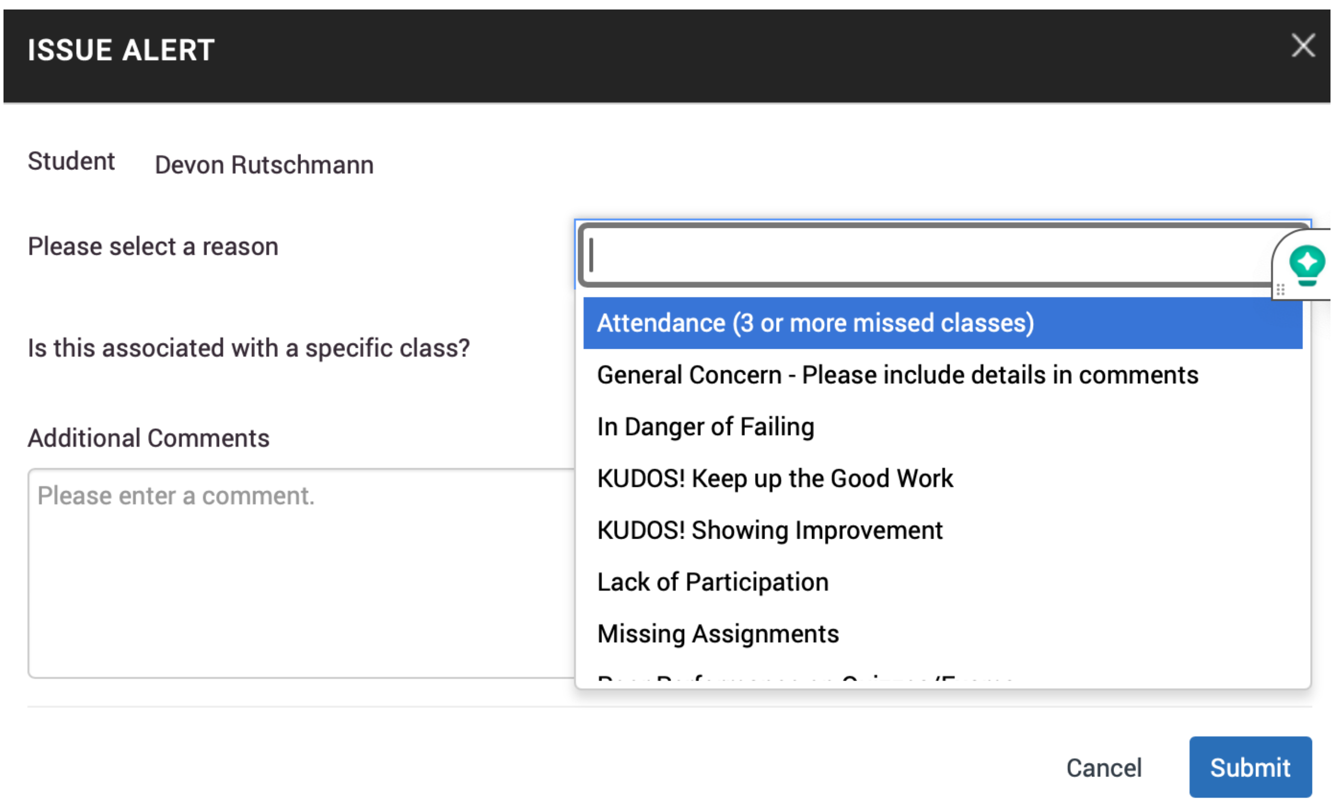
**Step 4:** If the alert is associated with a particular class, fill out that field.

**Step 5:** Lastly, please provide any relevant context around your reason for submitting the alert in the comments section. Comments will help the team reviewing alerts to connect the student with the right resources in a timely fashion.

**Step 6:** Issuing an alert may open a case. You will receive an email notification when the case has been resolved.




**TIP**: Use the glossary of Alert Reasons on the next page to understand what follow up action will be associated with each Alert Reason.




**For more detailed guidance, check out the Help Center!**

# Appendix A: Create a Progress Report or Issue an Alert

## Alert Reasons in Progress Reports and Ad-Hoc Alerts

Navigate360's alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student..

| Alert Reason | Description | Intervention |
|---|---|---|
| Attendance (3 or more missed classes) | Available on Progress Reports and Ad-Hoc. | Emails sent to student and Assigned Advisor. Case open and assigned to Kathleen Cook and Erica Meneses-Corona, who will follow-up with student. |
| You cannot pass (withdraw before the last date) | Available on Progress Reports. | Emails sent to student and assigned advisor. Case opened and assigned to Kathleen Cook. |
| In Danger of Failing | Available on Progress Reports and Ad-Hoc. | Emails sent to student and Assigned Advisor. Case open and assigned to Kathleen Cook and Erica Meneses-Corona, who will follow-up with student. |
| General Concern- Please include details in comments | Available Ad-Hoc | Case opened and assigned to Kathleen Cook and Erica Meneses-Corona, who will follow-up with student. (*NO AUTOMATIC EMAIL TO STUDENT) |
| Poor Performance on Quizzes/Exams | Available on Progress Reports. | Email sent to student to encourage them to contact their instructor. Link to tutoring resoursces. |
| Missing Assignments | Available on Progress Reports and Ad-Hoc. | Email sent to student to encourage them to contact their instructor. |
| Lack of Participation | Available on Progress Reports and Ad-Hoc. | Email sent to student to encourage them to contact their instructor. |
| You are starting to go off track | Available on Progress Reports and Ad-Hoc. | Email sent to student to provide list of campus resources. |
| KUDOS! Keep up the Good Work | Available on Progress Reports and Ad-Hoc. | Email sent to student to congratulate them. |
| KUDOS! Showing Improvement | Available on Progress Reports and Ad-Hoc. | Email sent to student to congratulate them. |
| Referral: Health & Wellness | Available Ad-Hoc. | Case opened and assigned to Amy Schaffer and David Bollig, who will follow-up with student. |
| Referral: Residential Life/Learning Communities | Available Ad-Hoc. | Case opened and assigned to Nathan Dozier, who will follow-up with student. |
| Referral: Tutoring | Available Ad-Hoc. | Case opened and assigned to Hannah Hearld, who will follow-up with student. |

# Appendix A: Create a Progress Report or Issue an Alert

## What happens after an alert is issued?

Depending on the type of alert will impact the Retention team outreach.

Alerts that only issue and automatic email to the student will only send the email and will include FHSU resources for the student.

Alerts that open a “Case”. Will be sent to the Retention team to follow-up.

**Day 1** after the alert a personal email will be sent to the student

**Day 3** with no response, a text message will be sent to the student.
(if no cell number, message sent as email)

**Day 5**, with no response, a phone call will be made to the student.

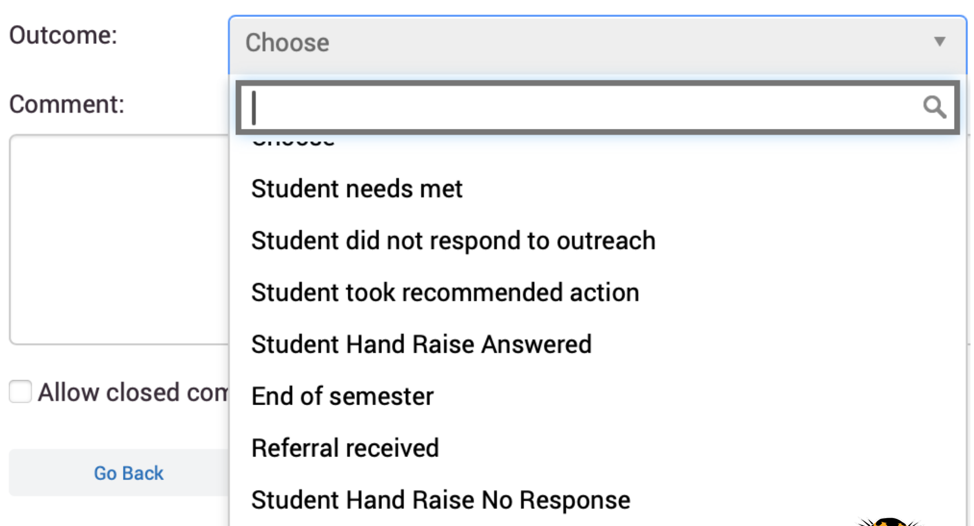
If the retention team, speaks with the student a close case reason will be added to Navigate and the alert raiser will be notified by email. Referrals can also be made in Navigate to support the student.

**Day 10 – 14**, with no response, close the case and email sent through the system to the alert raiser.

Referrals sent to different Student Success Offices will have different communication plans, check your case for additional notes. The health and wellness services office will not be able to leave information and notes in the system but will acknowledge that the case has been received.

**If you are concerned about an alert, the planned outreach, or the alert close reason, please email navigate260@fhsu.edu for assistance from a site administrator.**

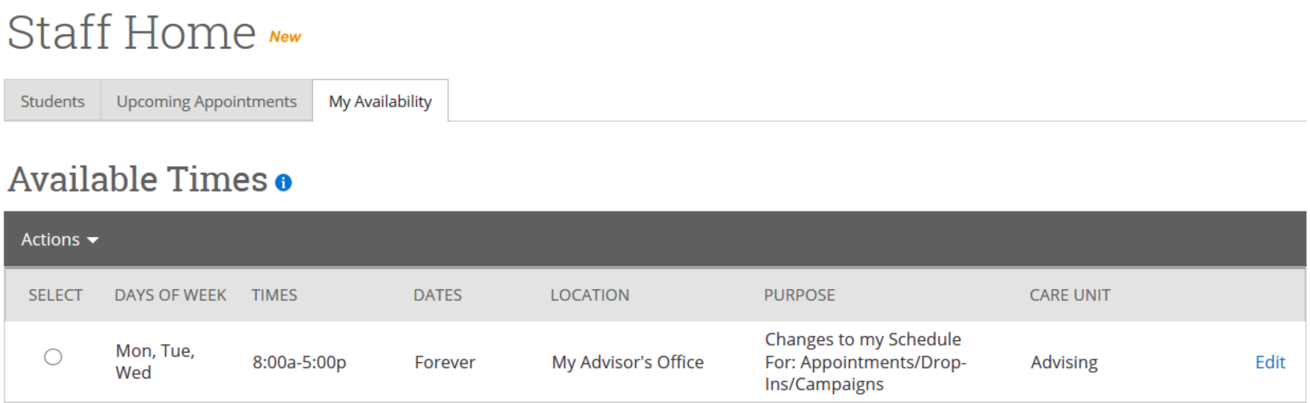
## Case Close Reasons?

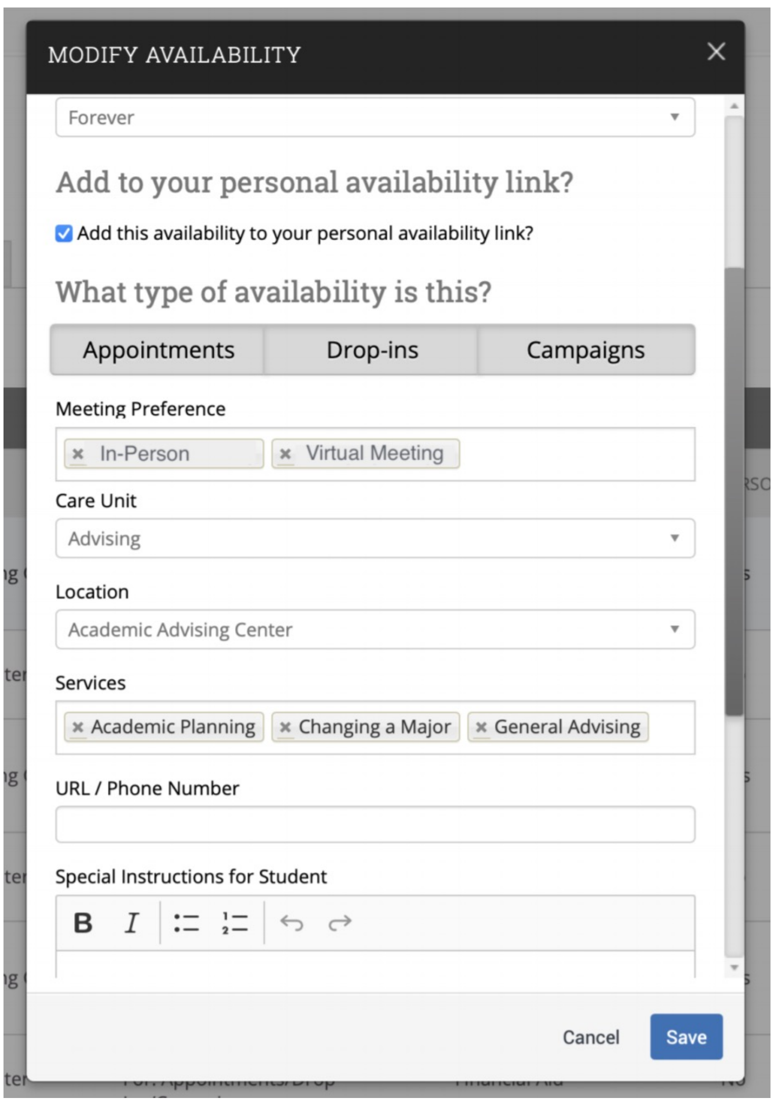


# Appendix B: Setting Up Your Availability

## Availability

As a new user, you can [set up availability](set up availability) so that students can schedule appointments to see you. It is important to note that locations and services are created by institution administrators. If you would like a new appointment type, please contact your Navigate 360 system administrators at [navigate360@fhsu.edu](mailto:navigate360@fhsu.edu)




### Add Time -

**Step 1:** Click the Add Time button in the Actions Menu

**Step 2:** Select the days as well as start and end time in the *From* and *To* fields.

**Step 3:** Set the length of the availability with the *How Long Is this Availability Active?* field.

**Step 4:** If you want this availability added to your personal availability link, select *Add This Availability to Your Personal Availability Link?* You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff/faculty's chosen availabilities pre-filled. (**Note**: Personality Availability Link only works for regular Appointments, not for Drop-in's and Campaigns)

**Step 5:** Select your Availability types. You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.

**Step 6:** For Meeting Preference, select the applicable meeting modality.

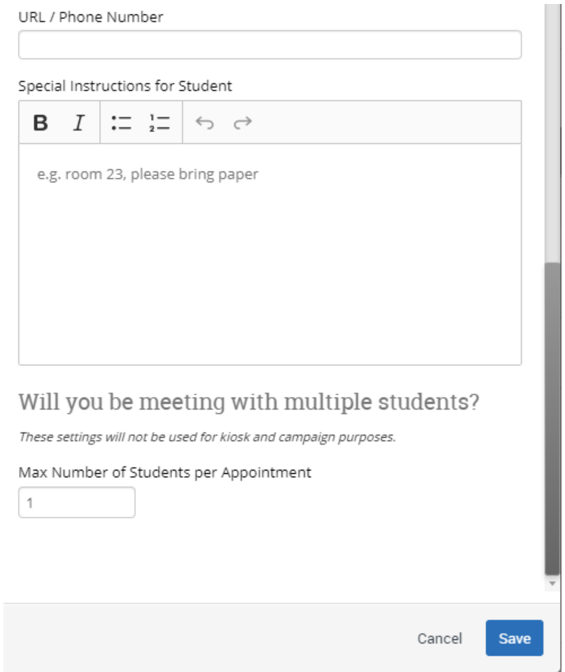
**Step 7:** For Care Unit, select appropriate functional area.

**Step 8:** Choose the location where you will be available.

**Step 9:** Select services you can provide students during this availability. You must choose at least one service but can pick more.

**Steps 10-14 continued on next page...**

# Appendix B: Setting Up Your Availability




**Step 10:** In the *URL / Phone Number* field, add your meeting link for your appointments.

**Step 11:** Use the *Special Instructions* box to include additional details for students. *(Example: We will use Zoom for our meeting, which you can access by using the link provided. Virtual meeting spaces allow us the flexibility to connect from various spaces. Please ensure the space you are in is conducive for such a meeting. I very much look forward to meeting with you!)*

**Step 12**: If you want to hold group appointments, you can specify the number *under Max Number of Students per Appointment.* Otherwise, you can leave is as 1 for one-on-one appointments.

**Step 13:** Click the Save button.

**Step 14:** Repeat this process until all your availabilities have been defined.

- You can have as much availability as needed.
- Creating multiple availabilities will enable you to set aside specific blocks for specific services (registration advising for example) or meeting types (drop ins vs. scheduled appointments)

**Editing Availability:**

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

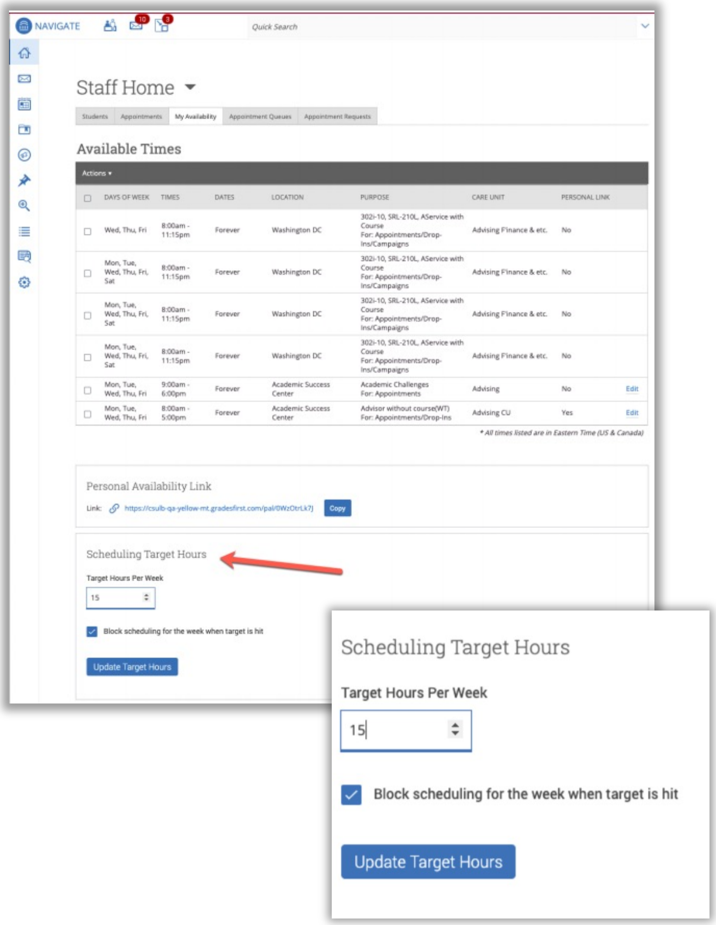
**Delete Time-** to delete your time, simply select the time and click the Delete Time button.

**Group Appointments -** You can create availability for group appointments by indicating how many students are able to schedule into the same appointment (indicate specific number under “Max Number of Students per Appointment”)

**Inactive availabilities** are highlighted in red in the Times Available grid.

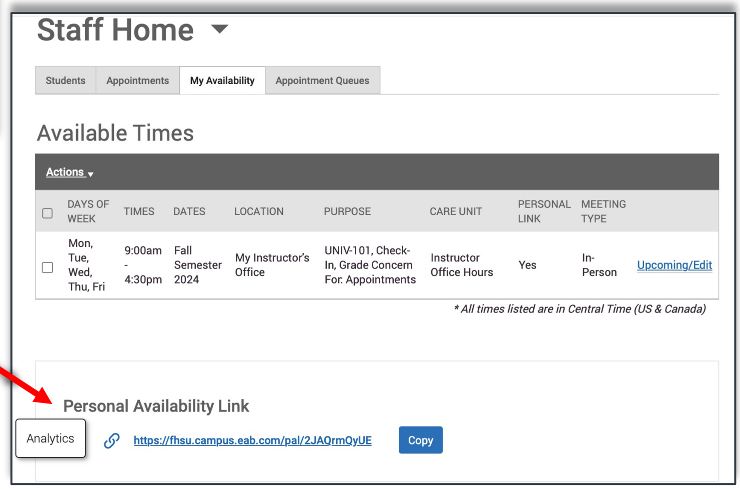
**For more detailed guidance, check out the Help Center!**

# Appendix B: Setting Up Your Availability & Target Hours




Target Hours allow staff to restrict the number of hours in which they can be scheduled for appointments via Student Scheduler.

- Staff set their Target Hours in the **Scheduling Target Hours** section.
- Target Hours have two aspects:
    1. ***Target Hours Per Week:*** This is the maximum number of hours per week in which they can be scheduled for an appointment. (You can set this between 1-168 hours.)
    2. ***Block scheduling for the week when target is hit:*** If selected (and hours have been reached), the staff member will no longer be available to students for appointments for the remainder of the week.
- **Note:** Target Hours are calculated against all Services, Locations, and Care Units. Your Leadership Team will provide clarification on how this feature should be used.




## Set up a Personal Availability Link

1. Select My Availability Tab
    a) Select Actions Tab
    b) Select Add Time
    c) Complete Add Availability Fields
        i. Days
        ii. Timeframe
        iii. How long availability should be active (Forever, Range of Dates or Specific Semester)
        **iv. Select Add to Personal Availability Link**
        v. Meeting Type (Modality of Appointment)
        vi. Care Unit (Only Option will be Instructor Office Hours, unless they are also a Faculty Advisor)
        vii. Location (My Instructor's Office)
        viii. Select Offered Services: Alert Follow-Up, Check-In, Faculty Mentor Meeting, Grade Concern
        ix. Select Course(s) they are teaching for the semester
        x. URL or Phone Number (URL if Virtual Availability)
        xi. Add Special Instructions for Student (will be included in Appointment Confirmation Email that student receives once they schedule the appointment)
    d) Save

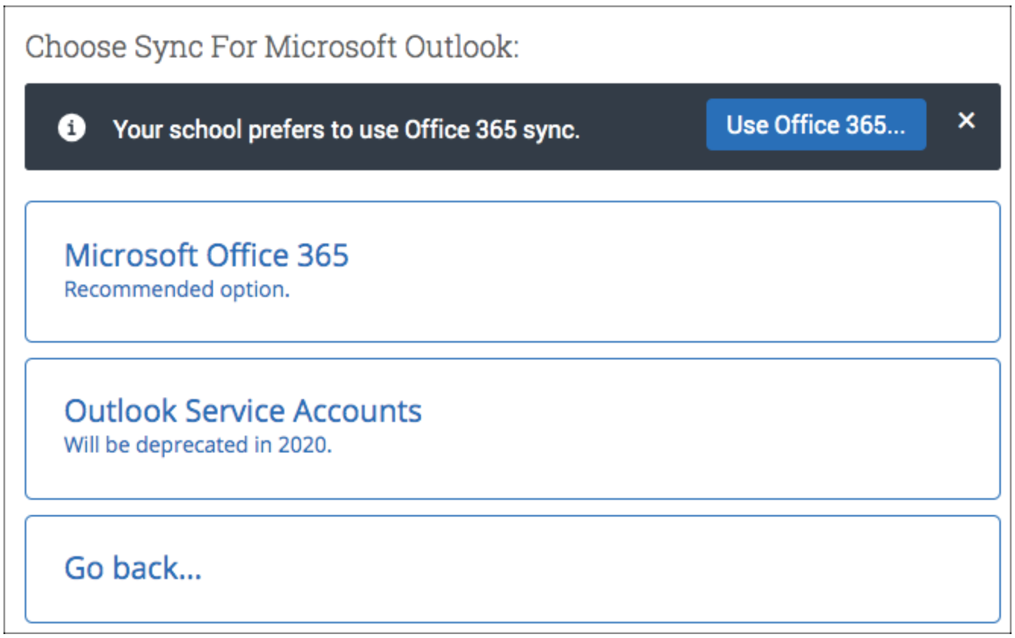
**NOTE: This link will only work once the student app is live and students can access Navigate.** The Personal Availability Link (PAL) display under Available Times and can be copy/pasted in Email Signature (hyperlinked to words i.e. Schedule With Me). Students who select the PAL will automatically come to the Instructor's Scheduling Page which is very similar to Calendly.

# Appendix B: Sync Your Outlook Calendar

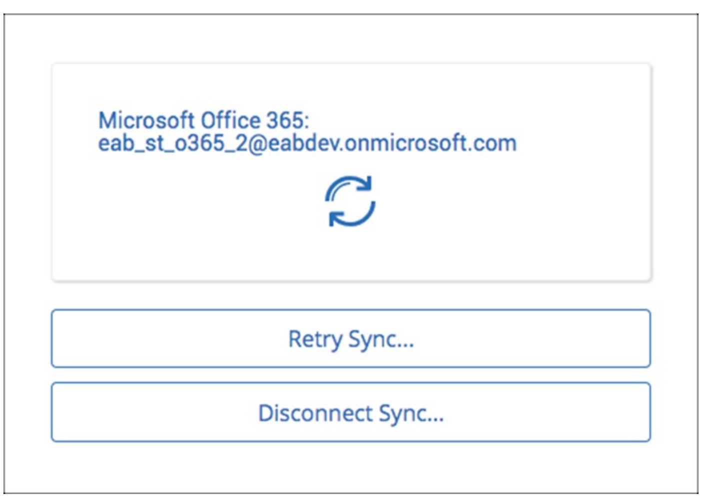
## Integrating Your Calendar

The availability you set up within Navigate360 dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate360 platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate360 to your personal calendar.

1. Toggle to the calendar page within Navigate360 using the calendar icon on the left side toolbar.
2. Select Settings and Sync on the top right side of the page
3. Click Setup Sync. You will see a "Your school prefers to use Office 365 sync" banner on Calendar with a "Use Office 365…" button to begin the setup.




4. Upon clicking the button, you will be routed to login.microsoftonline.com. If the you are not already signed into Office 365, you will be prompted to sign in.
5. After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing "Accept" will authorize and begin the syncing.




The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.

The Two-Way Sync will enable that any agenda item created from Navigate360 will sync back to your Outlook Calendar. All existing events and events that are created from your Outlook Calendar will be shown as 'Busy' in Navigate360

**For more detailed guidance, check out the Help Center!**

# Appendix B: Sync Your Outlook Calendar

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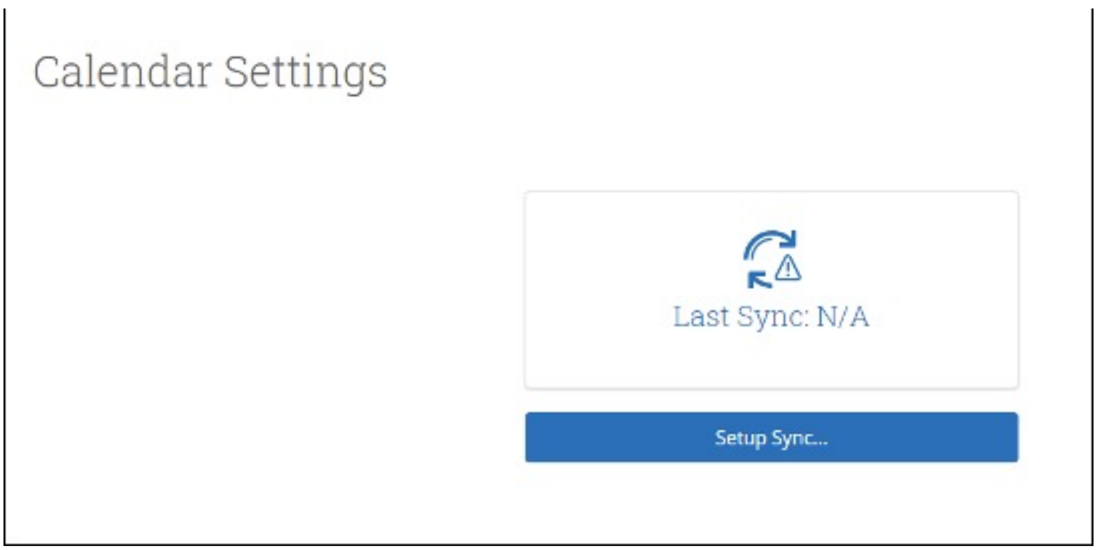
The availability you set up within Navigate360 dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate360 platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate360 to your personal calendar.

Select the calendar icon in the left navigation bar. Once on the My Calendar page, select the **Settings and Sync** button.

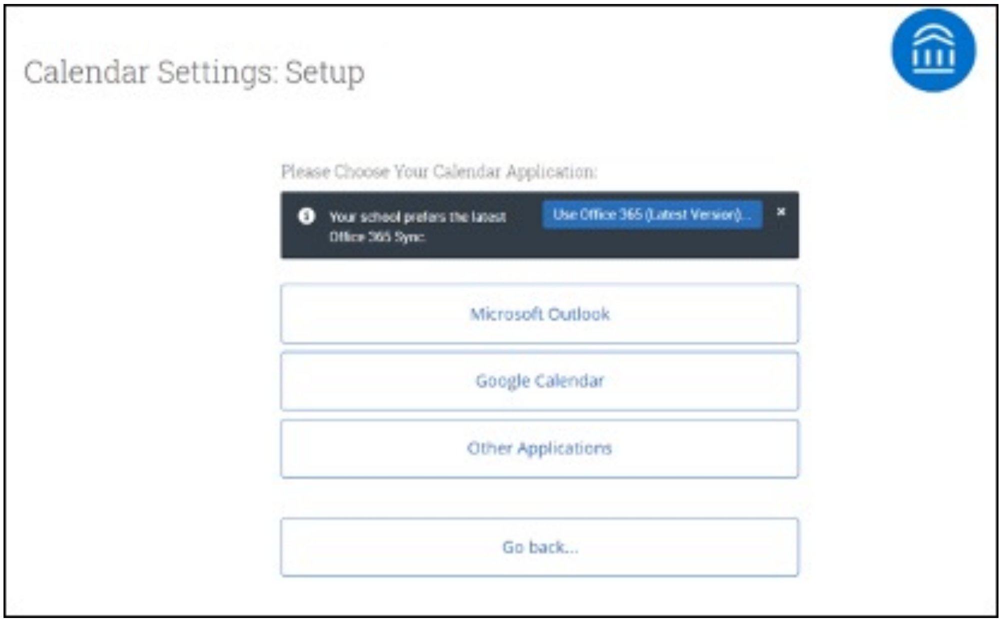

On the Calendar Settings page, select **Setup Sync…**



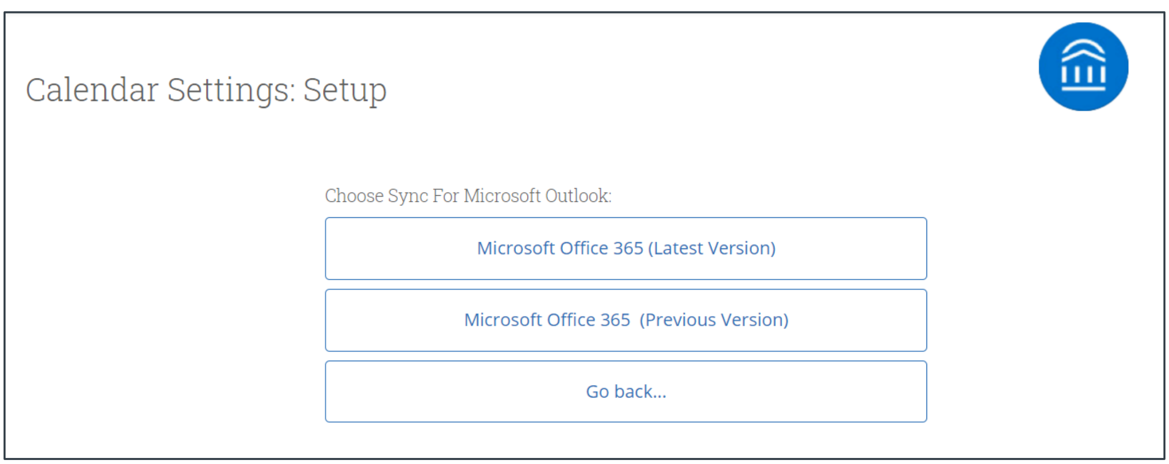
# Appendix B: Sync Your Outlook Calendar

## Integrating Your Calendar

If you see the following screen, click the button that says **Use Office365 (Latest Version)** at the top of the list of options, as in figure 3.



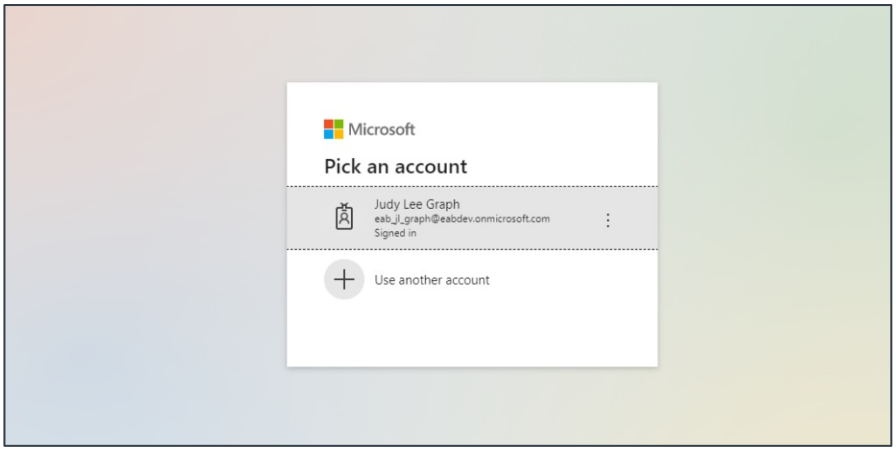

If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.



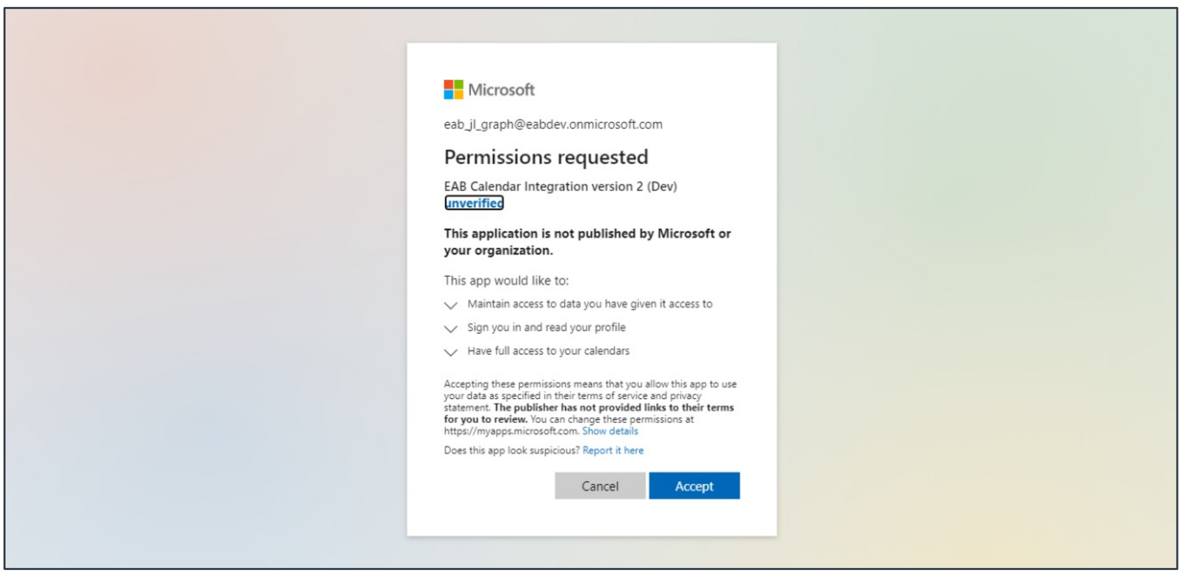

Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.

# Appendix B: Sync Your Outlook Calendar

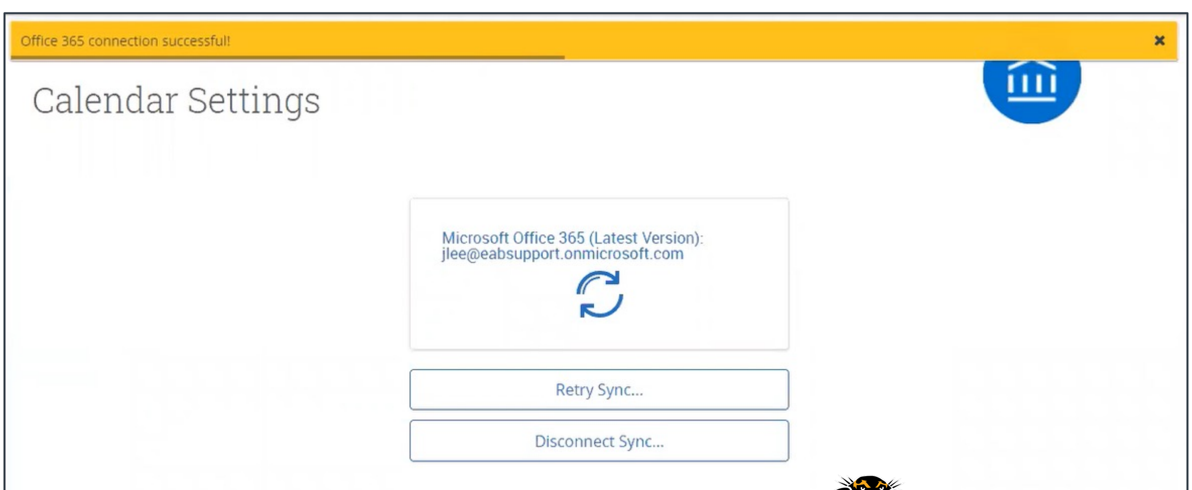
## Integrating Your Calendar




If you log in successfully, you see a page requesting permissions.




Select **Accept**. The page redirects to the Navigate360 Calendar Settings page, with a success message and information about the sync on display.



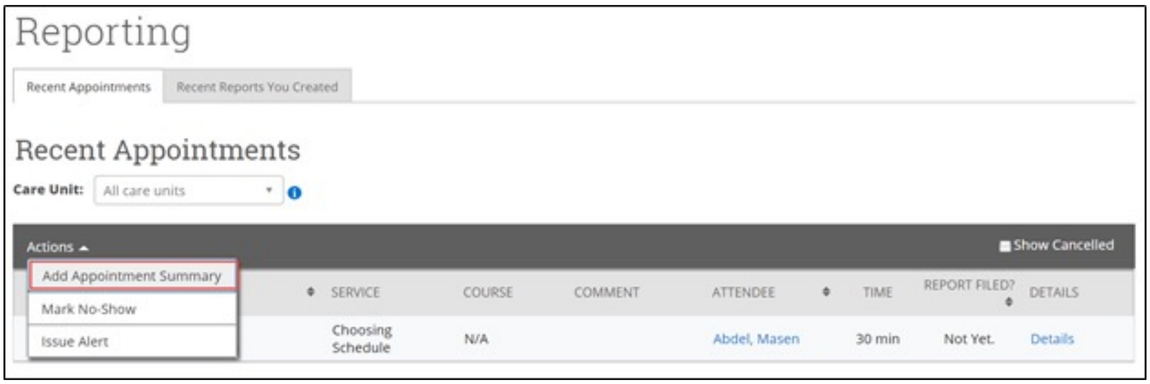
# Appendix C: Add Appointment Summary Reports

## Documenting a Student Interaction

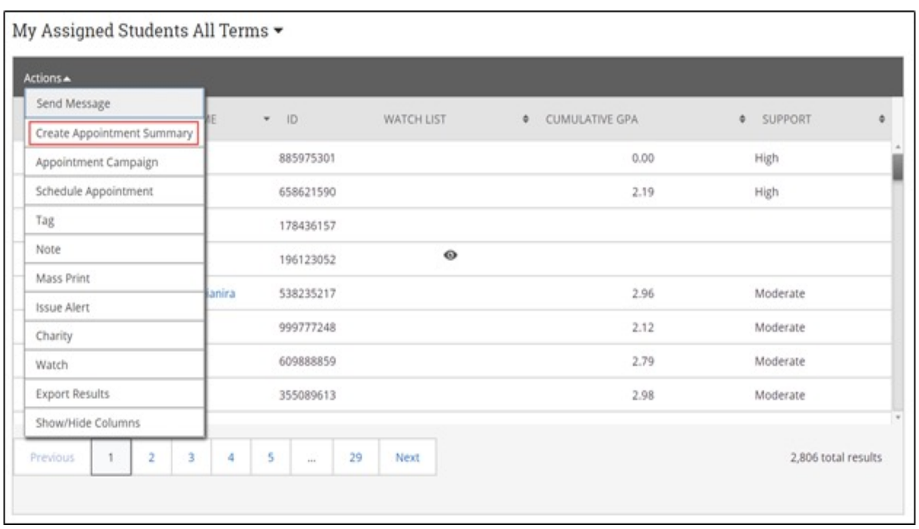
Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

**For Scheduled Appointments**: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

**Note**: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.




**For Drop-in Appointments**: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.




**For more detailed guidance, check out the Help Center!**

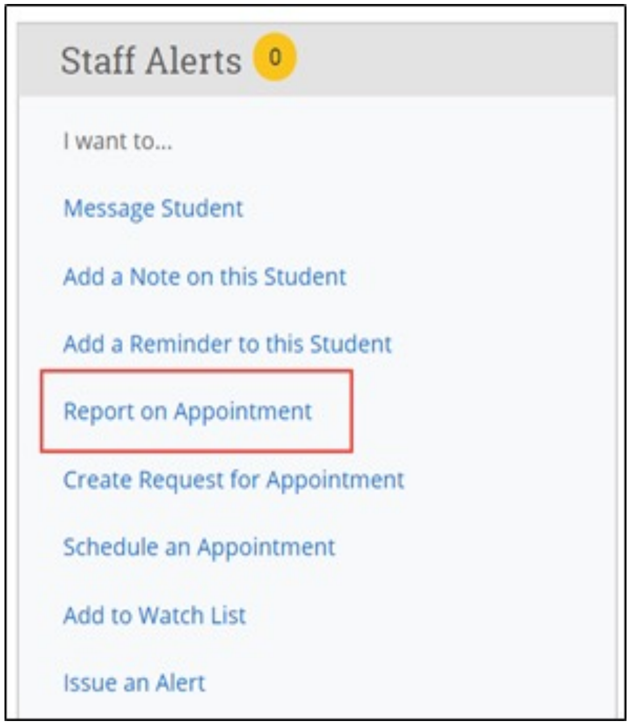
# Appendix C: Add Ad Hoc Appointment Summary Reports

## Documenting an Interaction

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate360 to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

**Reminder:** When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate360 platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the Navigate360 platform, this appointment created in the past will also sync to that calendar.

**For No-Show Appointments:** The primary way to mark a student as a no-show for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.




**Important Note:** Any information you enter into Navigate360 pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

**For more detailed guidance, check out the [Help Center](Help Center)!**