SDSU | San Diego State University

NAVIGATE

SDSU NAVIGATE TRAINING MANUAL

<table>
<tr><td style="background:#C8102E;color:#fff">ROLE: FACULTY</td></tr>
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NOTE: Faculty members have a default level of access upon logging into SDSU Navigate, which includes all of the functionality described below. They do not need to request special access to SDSU Navigate, unless they are a major advisor or department chair/director, which would provide student performance data such as GPA, progress toward degree completion, access to reports and analytics, etc.

Support Area	Functions & Processes
Student Information	• Easy access to expanded student information not available in other systems. • View "categories" that identify student affiliations (e.g., commuter, EOP, Compact for Success, International). • View "Tags" that provide important notes on student events (e.g. Leave of Absence). • View administrative notes about your students (e.g. serious health issues,death). • View "alerts" (referrals) for students (e.g. considering leave, referred to ECRT). • Student contact information.
Teaching & Outreach NOTE: All communication sent through SDSU Navigate appears automatically in the sdsu.edu email account. Even though email exchanges occur in gmail, a record is preserved in SDSU Navigate.	• Create lists of students (each course, master list for all courses). • Text, email or call students easily. • Email or text all students in every course and/or section at once. • Copy advisers, professors, student assistants, etc. on important communications. • Record of "conversations" • Add a report on Office Hours /advising (optional) • Add reminders to a student profile (that only you can see), which can alert you when it is time to follow-up with a student • See all your reminders for all students in all courses in one place
Intervention & Referrals	• Issue alerts for students to refer them to support services (e.g. tutoring, ECRT) • Respond to requests to complete progress reports as part of a Progress Report Campaign launched by advising staff • Create Ad-Hoc Progress Reports for students in your courses

GET STARTED

Logging On

1. Go to **sdsu.campus.eab.com**
2. Use your SDSU SSO (Single Sign On) credentials to login.

Training & Getting Help

• Visit the SDSU Navigate Website: **https://studentsuccess.sdsu.edu/navigate-sdsu**
• Self-enroll in the CANVAS Faculty/Staff Advising Homeroom: **https://sdsu.instructure.com/enroll/EMHDDP**
• Attend a training or open help session: **https://studentsuccess.sdsu.edu/navigate-sdsu/help-training**
• Submit an SDSU Navigate Help Ticket: **https://tinyurl.com/SDSUNavigateHELP**

Your Home Screen

The options on your homepage will look different depending upon the role you have been assigned in SDSU Navigate (i.e. advisor, peer advisor, professor, front desk, etc.). The most important components of your home page are:

A. ***Left Hand Navigation Bar/Menu***: vertical icons that border the left side of the screen. Use these to navigate between the different functions available in SDSU Navigate.
   - House = Home Screen
   - Envelope = Conversions
   - Calendar = Calendar
   - Push pin = Reminders
   - Looking glass = Advanced Search
   - Bullet points = Saved Student Lists & Searches
B. ***Quick Search Field***: enter a user's name, RED ID, email, etc. to search for a student and choose from the list that populates from this field.
C. ***Class Listing***: A list of all classes where you are listed as the instructor of record.
D. ***Students in My Classes***: A list of all students in your classes.
E. **Issue an Alert**: Issue a referral or coordinated care alert for any student. You can also issue alerts from the Student Profile Screen for a specific student, or for multiple students from the "Students in My Classes" list.
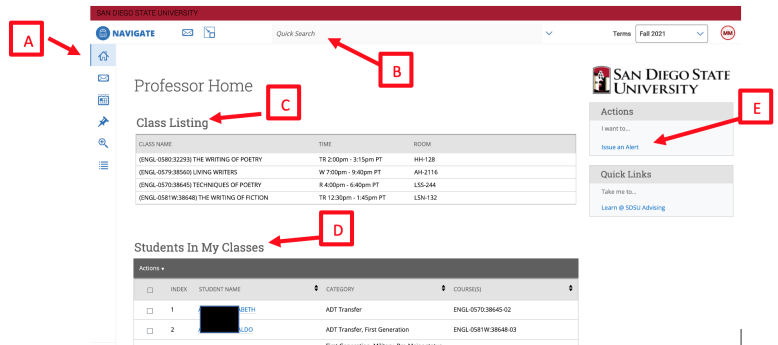
LOOK UP STUDENT INFORMATION

There are two ways you can look up student(s).

A. *Quick Search*: Click in the quick search field in the upper center of your screen, use the student's RedID, email, phone number or name. Once a pop up list appears, choose the correct student from the option. This function is most useful when looking up information for a single student.
B. *Advanced Search*: In the keyword field, you can copy and paste a list of RED IDs from a spreadsheet. You can also search by names as well.
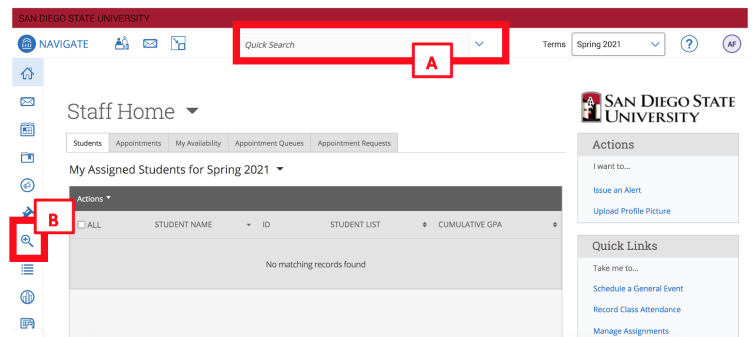
Student Profile

When viewing a student's profile, you will find information that describes the student, as well as links to take actions related to that student, described below:

A. ***Key Information***: the student's major, RED ID, term of most recent enrollment.
B. ***Additional Information***: the center three boxes outline any categories the student is associated with (special programs, transfer student status, minors, and more). In addition if the student has a tag on their profile (e.g., they are on leave of absence or a special outreach list) you will see this
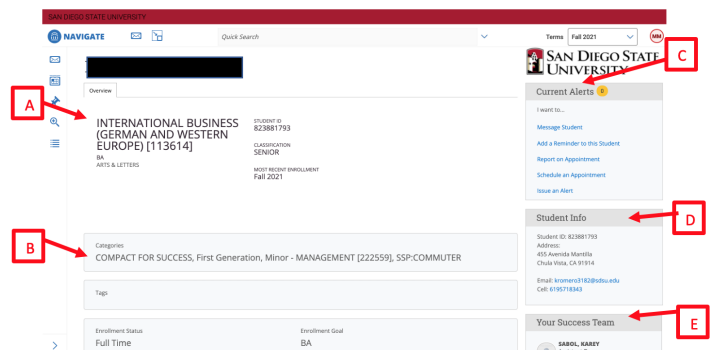
here. Finally, you'll see whether they are full or part time and what their degree objective is.

C. **Actions Menu**: View any alerts on your students, and take action for the student. You can message a student (email or text), add a reminder to a student profile, you can report on an advising session or conversation you had with a student (optional), schedule an appointment, or issue an alert.

D. **Student Info**: view the student's contact information.

E. **Your Success Team**: see who the students assigned advisors and other instructors are.

Take Action from the Student Profile Screen

A. **Staff Alerts***: identifies if any "Alerts" have been placed on the student. For example, if the student is considering a Leave of Absence, a "Leave of Absence / Departure alert" may be placed on the student. Alerts may open "Cases" which are managed by the assigned staff member.

B. **Action Links**: use links to take action with or for the student.
   - **Message student**: message the student (email and/or text). Please adhere to the SDSU Navigate Communication Standards.
   - **Add a reminder**: add a follow-up note (to yourself) to follow up.
   - **Report on Appointment****: add an advising report to the student's record.
   - **Schedule an Appt.**: schedule a future appointment for the student with anyone on campus. Note: only those trained to do this as part of their role should schedule appointments for other users.
   - **Issue an Alert**: click here to add an alert on the student.
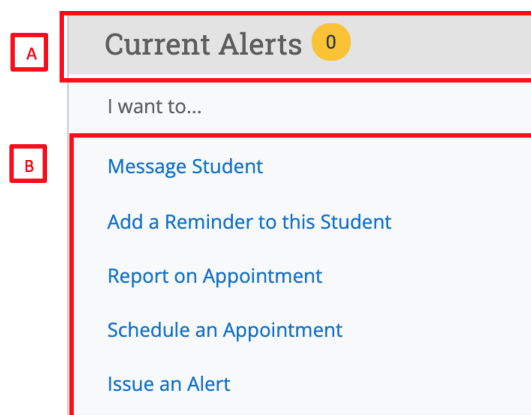
Set Reminders for a Student
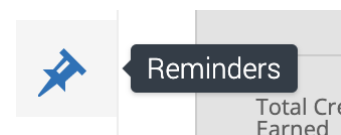
Reminders are created by staff members in order to prompt a future action regarding a particular student. This can be useful to track next steps for the staff member, to follow up on pertinent information shared during an appointment, or to reconnect with a student at a more appropriate time. For example, you may be working with a student who is having difficulty in a specific course - add a reminder to check-in on the student's progress after the upcoming midterm exams. Alternatively, the student may be exploring summer internship opportunities - add a reminder to touch base in a few weeks and find out where they applied. Staff can quickly add a reminder via the "Add a Reminder to this Student" link on the Student Profile Action Menu (described above).

NOTE: Only the faculty/staff member adding the reminder can view the reminder—these are personal to you. Students cannot see the reminders you add to their profiles.

You can see all the reminders you have added to student's profiles in one place by clicking on the "Push Pin" icon in the left hand navigation menu.

My Reminders

Upcoming And Overdue Reminders

	REMINDER	STUDENT	DATE	ACTIONS
☐	Check in on her writing center appoitnment,	GABRIELA RIOS	11/30/2021	Edit
☐	Ask about his internship application.	GENER ABDON	12/15/2021	Edit

The reminder details—name and due date—can be adjusted by clicking "Edit" next to the specific reminder. Staff can remove reminders that they have completed by selecting Clear or Delete from the Actions menu.

ISSUE ALERTS (Referrals)

We know that as educators our emphasis on student care and support are some of the key components to ensure their academic success. SDSU has made an investment in SDSU Navigate so we can continue to provide enhanced ways to collectively assist and support students. One of the mechanisms for doing so is Alerts. Alerts are raised by Faculty/Staff to communicate a concern about the student for referral or possible intervention. Alerts may result in an email with instructions or advice sent to the student, or to a case being opened and managed by a qualified SDSU employee. Alerts available include:

Alert Name	Type/Purpose	Submitted By	Management
Academic Support Referral	A student needs academic support for a course or subject area, or needs support with conducting research, etc. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email message about how to access a variety of academic support services at SDSU. **Under "Additional Comments"**: identify the course(s) and/or details on why you believe the student could benefit from tutoring, supplemental instruction or other academic resources.	Any User	Non-Case Alert: no case is opened. An email is sent to the student.
At-Risk to Fail	Instructors check this box as part of a Progress Report, or in an ad-hoc fashion, when a student is at-risk to fail the course. Email message sent to the students alerting them that they are at-risk to fail a course, with instructions about next steps they need to take. **Under "Additional Comments"**: identify the course and include as much detail as possible about why the student is at-risk to fail the course. For example, it may be due to missing assignments, frequent absences, inconsistent academic performance, other reasons, or a combination of reasons.	Professor	Non-Case Alert: no case is opened. An email is sent to the student telling them they have been marked "at-risk" to fail the course. Notification is sent to the Coordinated Care Advisor (CCA), Major Advisor, EOP Counselor, Athletics Advisor. Depending on the student's program affiliations and classification (FTF, sophomore, senior) the appropriate advisor will follow up with the student and check-in.
ECRT: Economic Stress / Basic Needs Insecurities	A student has an economic crisis or trouble meeting basic needs. Examples include: experiencing food insecurity, housing insecurity, homelessness, urgent financial crisis. **Under "Additional Comments"**: BE SURE TO INCLUDE THE STUDENT'S RED ID – do not add any specific details about the student's situation. If you have additional context to add about your concern, please email the ECRT team (ecrt@sdsu.edu) directly with the relevant details. The ECRT team may reach out to you for more information if needed.	Any User	Case Alert: a case is opened. An email is sent to the student. 1) The ECRT Case Manager will follow up with the student directly and triage the specific student issues. 2) In the most critical situations, the case manager may assign the student's advisor into the case with specific questions or requests for them as relevant. 3) Once student contact occurs and case management has been officially transferred to Maxient, the ECRT case manager will assign an outcome to the case in SDSU Navigate, and close the case. 4) ECRT will also input a "Note" in the student's record to document the interaction.
Financial Aid Referral	A student needs financial aid counseling and/or assistance (non-crisis). Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email with information	All Users	Non-Case Alert: no case is opened. An email is sent to the student.

	about how to contact the Student Financial Center (virtual help desk). **Under "Additional Comments"**: there is no need to identify any additional information for this alert.		
Leave of Absence / Departure Referral	A student mentions or indicates they may want to leave SDSU, either temporarily or permanently. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email about how to explore leave of absence as an option, and who to follow up with if they intend to go on leave, or if they intend to permanently end their studies at SDSU. **Under "Additional Comments"**: there is no need to identify any additional information for this alert.	Any User	No case is opened. An email is sent to the student. If the student later meets with the Assistant Dean / appropriate administrator, that employee will follow the existing business process, which should include adding a note to the student's profile and tagging the student appropriately.
CARES: Health / Wellness Referral	A student may be in need of mental health intervention or a wellness check. Examples of Health & Wellness referrals include: mental health challenges, medical emergency/illness, tragic or traumatic events including death in the family, serious academic difficulties including excessive absences, missing students. Undergraduate student employees should alert their supervisor if a student shares this type of information with them. **Under "Additional Comments"**: BE SURE TO INCLUDE THE STUDENT'S RED ID – do not add any specific details about the student's situation. If you have additional context to add about your concern, please email the CARES team (cares@sdsu.edu) directly with the relevant details. The CARES team may reach out to you for more information if needed.	Any User	An email is sent to the student. A case is opened. 1) The ECRT Case Manager will follow up with the student directly and triage the specific student issues. 2) In the most critical situations, the case manager may assign the student's advisor into the case with specific questions or requests for them as relevant. 3) Once student contact occurs and case management has been officially transferred to Maxient, the ECRT case manager will assign an outcome to the case in SDSU Navigate, and close the case. 4) ECRT will also input a "Note" in the student's record to document the interaction.
Registrar Referral	Student has a specific question or concern that falls into one of the following categories or scenarios: *I have credit for AP Calculus but I need to take Calculus with a letter grade. Can my AP score be removed?* *I failed a course at the community college then repeated it at SDSU. Can the community college course be forgiven and removed from my overall GPA?* *Can my high school transcript be evaluated for language proficiency to meet the language requirement for my major?* *My community college transcript shows I completed 60 units but my SDSU transcript shows only 56 were transferred. Why?* *Former students who are not in good academic standing and who have less than 90 units earned may be referred to the Office of the Registrar for advice on reapplication to SDSU.* Please advise your students (in the meeting, or via a conversation in SDSU Navigate) to check their SDSU email accounts for a message from the Office of the Registrar/Evaluations.	Advisors or Admissions Counselors	Case Alert: a case is opened. The Registrar Case Triage Manager will evaluate all alerts/cases and take one of the following actions: 1) If the referral has been made in error (e.g., an issue that should be resolved elsewhere), close the case and provide a comment to the issuer. 2) If the referral was made inappropriately or in error, provide information to the advisor to help them advise the student as needed and close the case. 3) Assign the case to a staff person in the Evaluations Unit so that this person can communicate directly and/or meet with the student as needed. 4) Once the issue is resolved, notes will be added, an outcome assigned, and the case closed.

	Under "Additional Comments": BE SURE TO INCLUDE THE STUDENT'S RED ID – Please provide detailed notes in the comments section that clearly outline the issue that the Registrar's Office can help resolve/support.		
Registrar Referral *(for Global Education Advisors Only)*	Student has been approved for a study abroad program by the Global Education Office and is in possession of the SDSU Global Education Academic Approval Form. Global Education will refer these students to Evaluations to acquire the academic information relating to the international institution, and the signature of the international evaluator. Students who are not yet approved or who are not yet in possession of the Academic Approval Form should not be referred. Under "Additional Comments": BE SURE TO INCLUDE THE STUDENT'S RED ID – Please provide the specific reason for the referral (i.e. "Student requires Global Education Academic Approval form Section C.1 be completed.")	Study Abroad Advisors	Case Alert: a case is opened. The assigned International Evaluations team will insert a "Note" in the student's SDSU Navigate record with all of the academic information relating to the international institution. They will then close the case, and notify the student via the SDSU email of the "Note" submission. Students and advisors are able to view the "Note" in SDSU Navigate.
Student Grievance Referral	Astudent has a specific complaint or grievance about the university and/or its staff, faculty or administrators. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an email referring them to the Office of the Ombudsman and the grievance procedures listed on that website. Under "Additional Comments": there is no need to identify any additional information for this alert.	All Users	Non-Case Alert: no case is opened. An email is sent to the student.
Technology Assistance	Student is experiencing specific issues with access to or use of technology. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student receives an automated email with information about how to get support with obtaining and utilizing technology resources. Under "Additional Comments": there is no need to identify any additional information for this alert.	All Users	Non-Case Alert: no case is opened. An email is sent to the student.

From the Staff or Professor "Home" screens

Step 1: Select "Issue an Alert" from the "Action" menu.
Step 2: Search for the student for which you want to issue the alert.
Step 3: If the alert is related to one of the student's courses, select that course from the drop down list.
Step 4: Add any comments.
Step 5: Click Save.

On the Student Profile

To issue an alert from a student profile, select **Issue an Alert** from the **Action** pane as in the following screenshot.

When Completing a Progress Report

Faculty can also issue alerts through Progress Reports, which are requests for updates on student progress (for athletes and EOP students only) in a specific course. The only alert available on the form is the "At-risk to Fail" alert.

COMMUNICATE WITH STUDENTS

Advisors are expected to communicate with their students using SDSU Navigate, and such communications are subject to FERPA and the SDSU Navigate Communication Policy.

NOTE: Please see the SDSU Navigate Guide "FERPA: Privacy Dos and Don'ts" (Canvas Advising Homeroom), review the FERPA Guidelines from Enrollment Services, and the SDSU Navigate website (which houses the SDSU Navigate Communication Standards).

Send Messages

You can send emails or texts to one or more students from Staff Home, the student profile, or Advanced Search. Most Action menus throughout the platform also allow for sending emails or texts. You can send both text and email messages to either a **single student** (from a student's profile, select "Message Student") or to a **group of students** (from either a search result or a list). When the messaging management box pop up, please keep in mind**:**
  A. Use the "tabs" to toggle between "Send Email" or "Send Text," and choose the type of message you want to send.
  B. After filling out the message content, if you want to "cc" another person in the message, you can add their email addresses to this field.

NOTE: Please note that texts sent via SDSU Navigate to students will come from a pool of numbers, most of which are outside of California. This means that the phone number students will receive text messages from may be registered in another state. This is a global setting for SDSU Navigate and cannot be changed (as of now). If you choose to text students, make sure that the text content clearly identifies who you are and that the text is from SDSU.
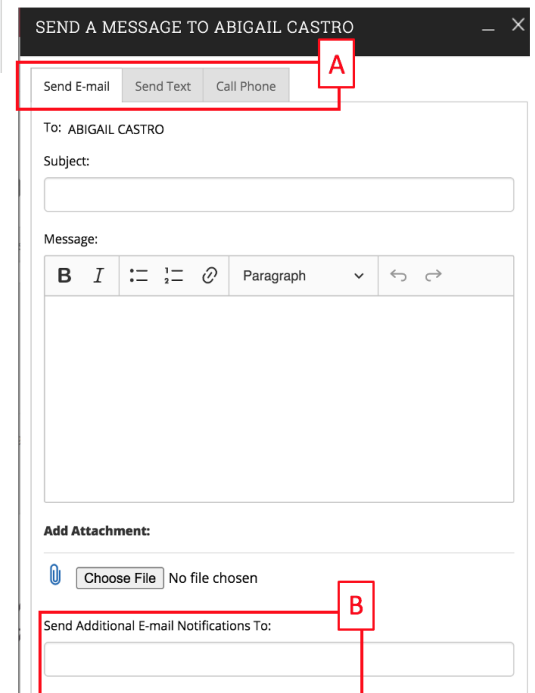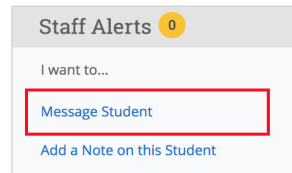
PROGRESS REPORTS

The progress report process can be a two-way street:

  1. **Ad Hoc Progress Report:** professors can submit an ad hoc progress report for a student or group of students any time there is a concern, or if they want to provide positive feedback for outstanding performance in the course.
  2. **Progress Report Campaign:** these campaigns are sent from an advising office or administration to professors to solicit feedback about a certain group of students.

Issue an Ad-Hoc Progress Report

When you have a concern about a student's academic progress, consider discussing the concern with the student as a first step. Students early in the semester may not yet have a sense of their own progress, or they may know they are

struggling but do not know how to get help. Often hearing from their instructor that they are at-risk will be just the signal they need to get back on track.

Other issues, like Health & Wellness Concerns, may be contributing to the student's challenges. If you suspect the student might need support, in addition to issuing an ad-hoc progress report, you may want to issue a Health & Wellness Alert in addition to a progress report.

To issue an Ad-Hoc Progress Report:
  A. On your Professor "Home" screen, view the "Courses" section.
  B. Click "Progress Reports" next to the course you want.
  C. Check the specific students you'd like to complete progress reports for, or check the "select all" box.
  D. From the Actions Menu dropdown, select "Create a New Progress Report."

The progress report dialogue box will appear:
  A. Click "YES" to show you have concerns about this student, which will allow you to provide additional details. Click "NO" to provide a positive report.
  B. Choose the Alert Reason from the drop-down options.
  C. Indicate the number of absences, if an issue, or leave blank if not.
  D. Indicate an estimate of the current course grade.
  E. Use the comment box to summarize the concerns.
  F. Click submit report.

NOTE: Students may be able to see your comments so please be as clear as you can in your comments, with a focus on class performance, and write with the student as the intended audience.

Respond to a Progress Report Campaign

When one of your students is included in an advising or university Progress Report Campaign, you may receive an email during the semester prompting you to provide feedback on the success of some of the students in your courses. A Progress Report Campaign allows SDSU to focus on the success of specific populations of students, and your feedback about course progress is vital.

You are able to provide all feedback by clicking on the link within the email with no need to log in to SDSU Navigate. A web page will display the courses you teach and the class roster for those courses. Note that the students displayed may not be all of the students in that class as Progress Report Campaigns typically target specific populations of students, though sometimes they can target entire courses. The emailed progress report

format looks a little different from completing an Ad Hoc Progress Report, however the information options are identical, including Alert Reasons, absences, grades, and an open-text box to share any additional context.

Alternatively, when you can log into your SDSU Navigate account, you will also see requests to complete progress reports listed on the top of your homescreen inside of a yellow banner:

Only those students about whom you have concerns need to be marked; the un-marked students can be submitted as not at-risk in the course by clicking the blue button at the bottom of the screen once finished.

What Happens After You Submit a Progress Report?

When you submit a progress report:

1. The students Coordinated Care Advisor (CCA), Major Advisor, EOP Counselor, and Athletics Advisor receive a notification.
2. The student receives the following email:

   You have been marked at-risk to fail (by your instructor) for at least one of your courses. If you are an athlete or an EOP student:

   > ***Athletes***: *please make an appointment with your Athletics Advisor to discuss options for tutoring and other types of support.*

   > ***EOP Students***: *please make an appointment with your EOP Counselor to discuss options for tutoring and other types of support.*

   *If you are not an athlete or EOP student, but you have an **assigned Retention Advisor or Math Initiatives Coordinator** (you can see which advisors are assigned to you in SDSU Navigate under "Your Success Team") -- please meet with your Retention Advisor or Math Initiatives Coordinator.*

   All other students:

   > ***Freshman and Sophomores****: *please make an appointment with your Coordinated Care Advisor.*

   > ***Juniors and Seniors****: *please make an appointment with your Major Advisor.*

   > **If you are part of a special program (e.g. Weber Honors College, Compact Scholars, Cultural Resource Center Group), please feel free to schedule with one of those program advisors.*

   Instructions for how to schedule an advising appointment can be found on the SDSU Navigate website.

   SDSU has many resources and support services that can help you improve your academic performance and assist with personal concerns. We hope you will take advantage of the plentiful programs, services and supportive people at SDSU to help.