Navigate Resources: Alerts Campaign and Maroon/Gold Campaign

Spring 2024

Contents

Navigate360

Navigate is a comprehensive, early alert and advising platform that combines technology, research, and predictive analytics to assist in improving Salisbury University student outcomes. It provides effective and efficient means to:

- **Early Interventions**: Identify/prioritize the students needing assistance
- **Focused Advising**: Conduct meaningful advising sessions, and engage students who may need support in their chosen academic program
- **Predictive Analytics**: Approach students holistically based on their major, course performance, and any barriers that may prevent them from persisting while at Salisbury University.

Alert Campaign

#1: Alert Campaign

Rationale:	1) Students will continue key student success behaviors when reinforced 2) Struggling students can be retained if we support and mobilize care for them, but we cannot help if we don't know.
Goal:	To increase overall retention (all students) by reinforcing success behaviors and connecting care to those who need it
Chair/Director Role:	• Use department/school data to influence your colleagues to submit alerts (+ and -) • Submit alerts when you learn of a student who is struggling or needs reinforcement
Data:	• # of alerts submitted by each departments (historical and current) • Registrations of students (with alerts and overall) • Retention of students (with alerts and overall)
Timeline:	FEB 12: Campaign Education FEB 16-19: Data Sharing FEB 19: Campaign Launch*	MAR 4: Nudge from Provost MAR 25: Nudge from Deans APR 8: Nudge from Advising APR 4: Nudge from Chairs/School Directors* MAY 13: Nudge from Chairs/School Directors*
Tools:	Navigate and How-to Videos, Mid-semester alert data check-in

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Benefits of Notifications/Referrals in Navigate 360

Faculty and staff can issue a notification/referral at any time during the semester. Notifications/referrals connect students to support systems across campus for various reasons, such as academic or participation concerns, needing tutoring, or financial barriers. Issuing a notification/referral will prompt action from the appropriate department to try to connect with the student to provide support.

Notification/Referral Types

The following notification/referral reasons are available in Navigate 360:

- + Academic Kudos (Via an Automated Email to Student)
- Academic Advising Center

- CSA Success Coaching (Study Strategies, etc.)
- CSA Tutoring/Supplemental Instruction
- Career Services
- Chemistry Support Center
- Disability Resource Center
- Financial Aid
- Honors College
- Math Emporium
- Nationally Competitive Fellowships
- Office of Diversity & Inclusion
- Study Abroad/Study Away
- Writing Center

Issuing a Notification/Referral

- Alert Reason: Select at least one notification/referral reason. If applicable, you may issue more than one notification/referral. A separate case for each student will be opened on multiple notifications/referrals.
- Association with Specific Course: The notification/referral can be associated with a specific course in which the student is enrolled. This is important if the student is missing class, needs tutoring, etc.
- Additional Comments: Enter all comments related to the notification/referral.

Remember, any information you enter in Navigate 360 becomes part of the official student record and may be subpoenaed by the student.

How to issue a Notification/Referral in Navigate 360
Video Tutorial

Notification_Referr
al Navigate360.mp4

Step 1: Log in to your Navigate account.

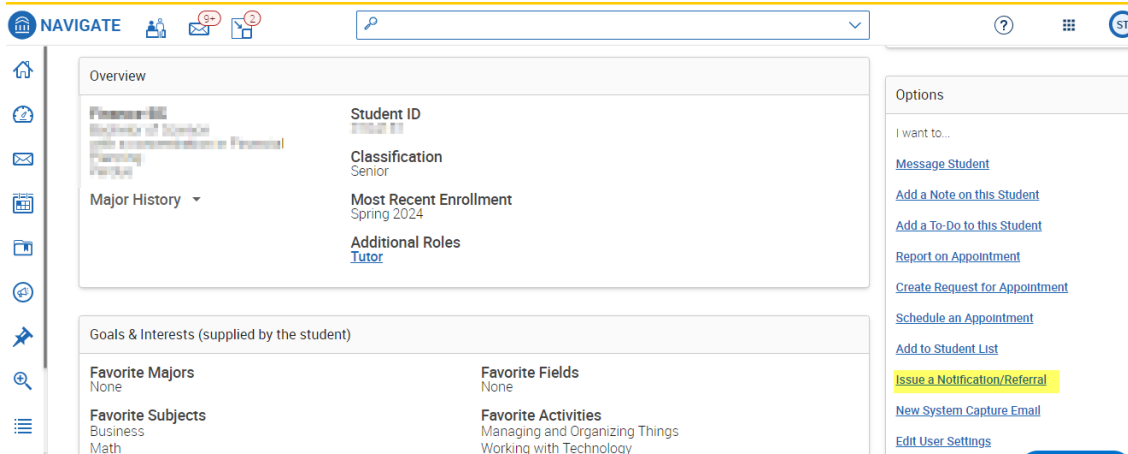Step 2: There are three ways to issue a notification/referral.

Issue a notification/referral from the home page.

Issue a notification/referral from the action button on your advisee (staff) or class (professor) list.
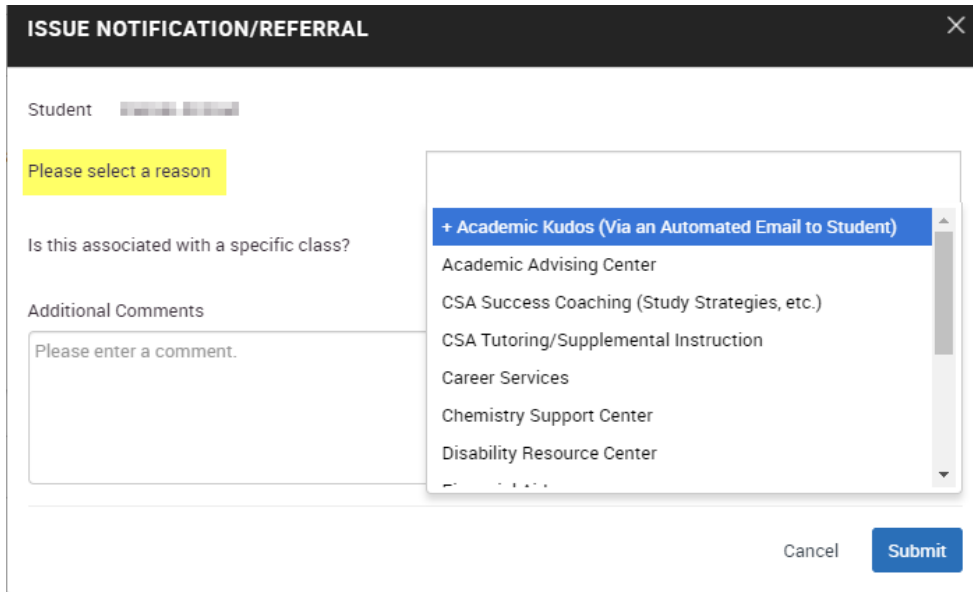
    a. Select the checkbox next to the student's name.

    b. Click on action and select notification/referral.

Issue a notification/referral from the student page.

Step 3: Select a reason for the notification/referral

Step 4: Indicate if the notification/referral is associated with a specific course. This is helpful if a student needs tutoring or is missing class.

Step 5: Provide any additional comments that would be helpful.

Step 6: Click submit for the notification/referral to be sent to the appropriate support team.

Workflow of Notification/Referral

- Faculty raise notification/referral
- Received by Salisbury University office (Academic Advising Center, Center for Student Achievement, Disability Resource Center, etc.), that creates a case
- Outreach to connect with the student via email, text, phone call
- Schedule an appointment with the student
- Report on appointment in Navigate (see notes, appointment summary)

- Manage case or refer to the appropriate office
- Email to the notification/referral issuer when the case is closed (NEW Spring 2024)

Additional Campus Resources

Counseling Center

SU Cares

Maroon/Gold Campaign

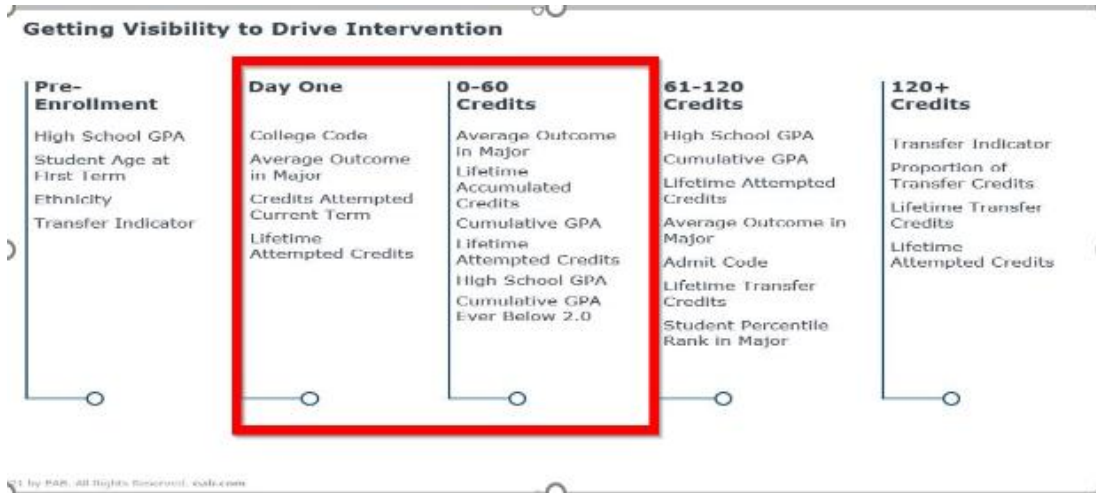# #2: Maroon/Gold Campaign

Rationale:	At-risk students require additional care and support, as well as engagement	
Goal:	To increase retention of at-risk first-year students through engagement and coordinated care	
Chair/Director Role:	Conduct meetings with at-risk students (screening of need/support/engagement) Submit alerts when you learn of a student care need	
Data:	• Names/contact info of high-risk and moderate-risk students by department • Meeting engagement by students/notes • Midterm academic success • Fall registration data • First-to-second year retention data	
Timeline:	FEB 12: Campaign Education FEB 16-19: Data Sharing FEB 19: Set up for Launch* FEB 26: Campaign Launch*	FEB 26-8: Meetings with High-Risk Students* MAR 11: Campaign Check-in Meeting* MAR 11-29: Meetings with Moderate-Risk Students* APR 1-19: Follow-Up Emails to At-Risk Students* APR 22-MAY 10: Follow-up As Needed*
Tools:	Support guide, Navigate and How-to Videos, midterm grade and registration data	

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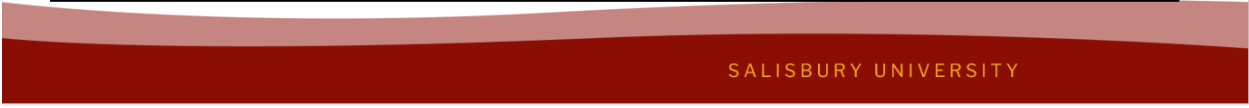
Predictive Analytics Model

The predictive model uses years of historic data on Salisbury students to understand and better predict a student's likelihood to persist to the next fall term (or graduate before then). Understanding that different variables are more impactful at different points during a student's tenure at the university, there are five sub models within Salisbury's predictive model to take these variables (and how impactful they are) into account.

Getting Visibility to Drive Intervention

Pre-Enrollment	Day One	0-60 Credits	61-120 Credits	120+ Credits
High School GPA	College Code	Average Outcome in Major	High School GPA	Transfer Indicator
Student Age at First Term	Average Outcome in Major	Lifetime Accumulated Credits	Cumulative GPA	Proportion of Transfer Credits
Ethnicity	Credits Attempted Current Term	Cumulative GPA	Lifetime Attempted Credits	Lifetime Transfer Credits
Transfer Indicator	Lifetime Attempted Credits	Lifetime Attempted Credits	Average Outcome in Major	Lifetime Attempted Credits
		High School GPA	Admit Code	
		Cumulative GPA Ever Below 2.0	Lifetime Transfer Credits	
			Student Percentile Rank in Major	

How to Report on Appointment

Video Tutorial

Report on Appointment.mp4

Reporting on a student appointment will help determine the impact of the Maroon/Gold Campaign. Follow the instructions to report on the appointment for student data collection purposes.

Step 1: Log in to your Navigate account.

Step 2: Search for the student in the search bar at the top of the home screen.
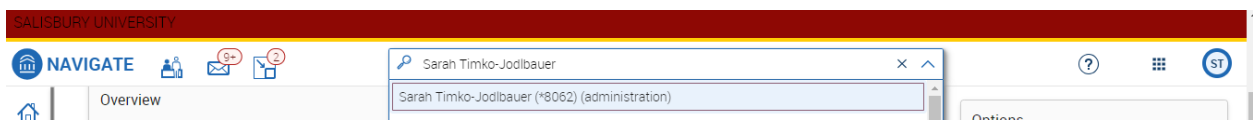
Step 3: Select Report on Appointment from the options on the right-hand side of the screen.

Step 4: Connect the appointment to the Maroon/Gold Campaign. **Please be sure to select the following.**

Care Unit: Faculty Office Hours

Location: Faculty/Professor's Office

Service: Maroon/Gold Campaign (scroll down in the menu)

Step 5: Select "Save this Report" at the bottom of the screen.

# Additional Navigate360 Resources

Re-Sync Navigate to Outlook

If you want to use Navigate to create appointments, make sure you are synced to your Outlook calendar. This way students are not able to schedule appointments during times you have your Outlook calendar marked as "busy."

1. Log in to your Navigate account.

2. Click on "Settings and Sync." If you see this bar at the top of your home screen, you will need to re-sync your Outlook calendar and Navigate.

3. Select "Disconnect Sync."
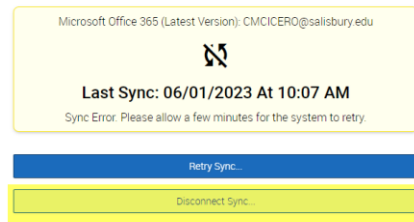
4. Select Confirm
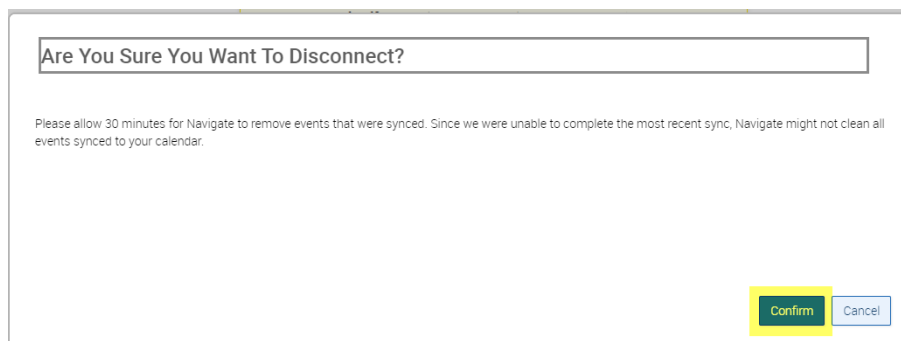
5. After 30 minutes, select Calendar Settings to re-sync to Microsoft Office 365. Select Setup Sync.

Calendar Settings
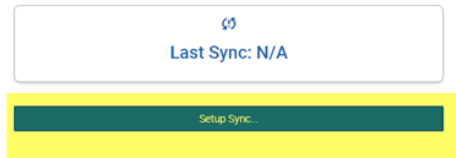
6. Select Microsoft Office 365.

Please Choose Your Calendar Application:

Microsoft Office 365 (Latest Version)

Google Calendar

Other Applications

Go back...
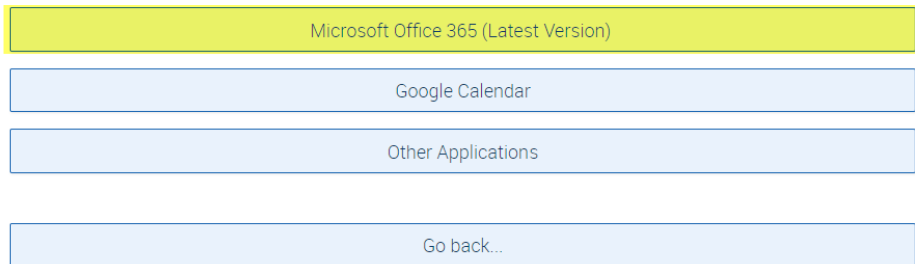
7. Pick your account.
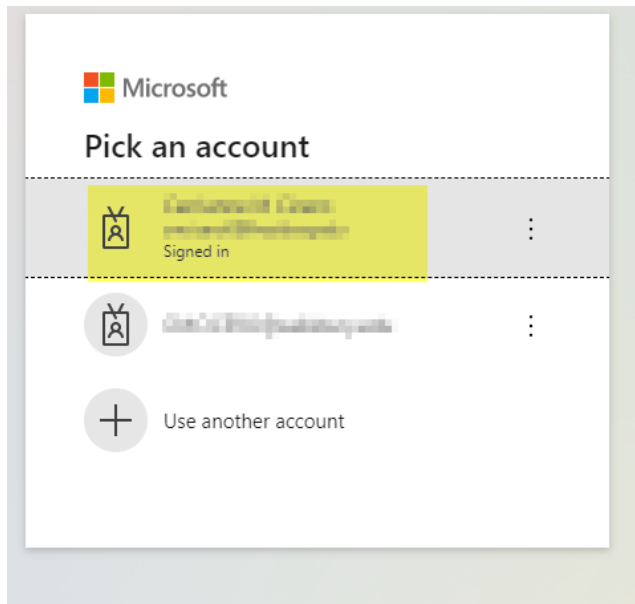
8. Select accept permission.
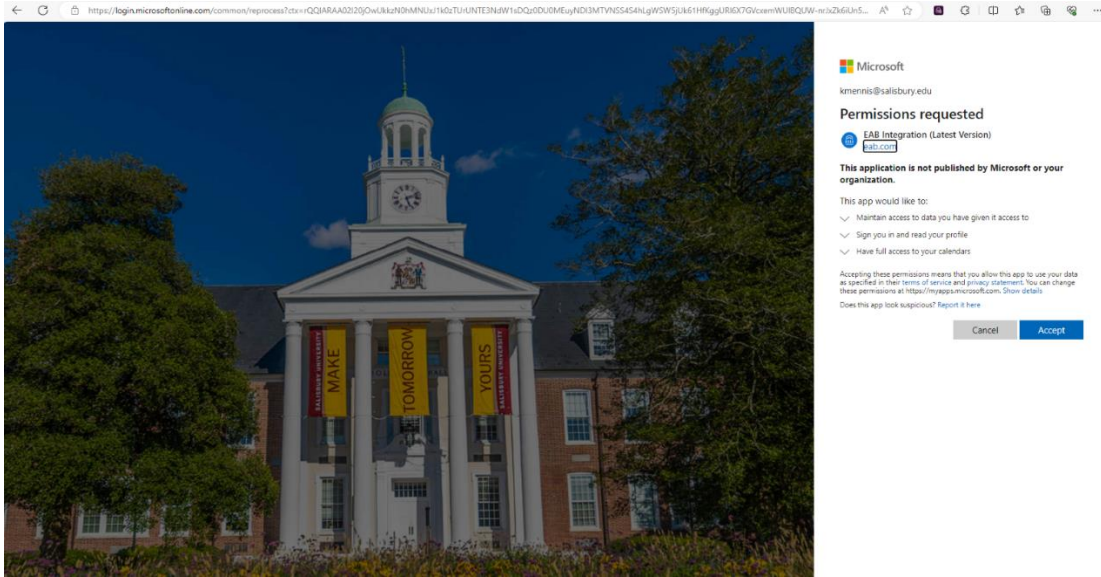
9. Select Retry Upgrade

10. Select Retry Sync

11. You should see the following screen when the sync is complete.

Microsoft Office 365 (Latest Version)

KMENNIS@salisbury.edu

Last Sync: 01/08/2024 At 12:44 PM
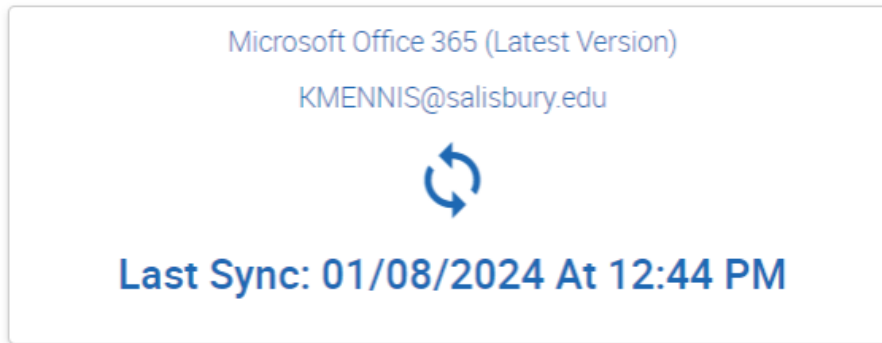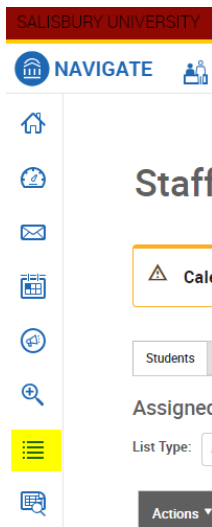
Upload an Excel List to Navigate

Lists provide an effortless way to communicate with students and to run Appointment Campaigns.

Step 1: Save your Excel list as a CSV (comma delimited)
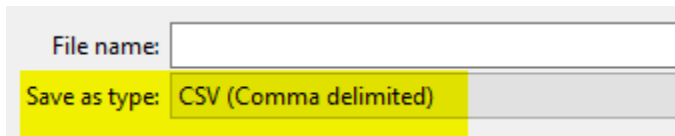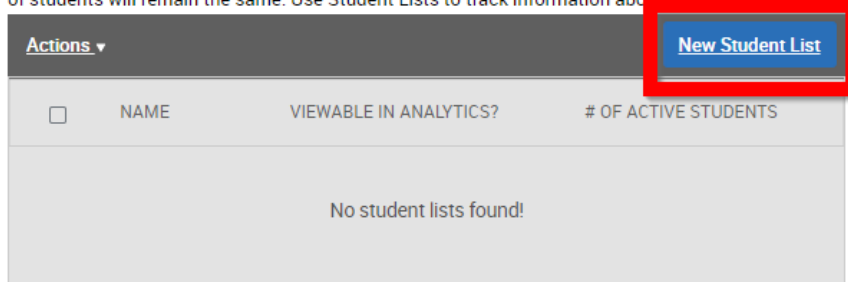

Step 2: Log in to your Navigate account.

Step 3: Select "Lists & Saved Items" from the menu bar on the right-hand side of the home screen.

Step 4: Select "New Student List".

Step 5: Name the student list and save the student list.
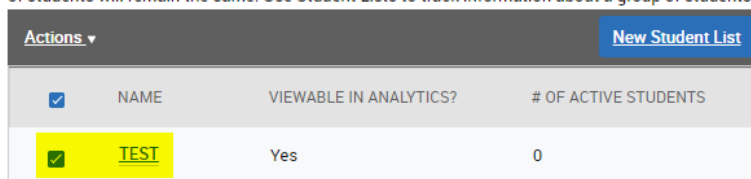
Step 6: Put a checkmark next to the list that you want to upload information to.

Step 7: Click on Actions and select Upload Student List.

My Saved Items

Student Lists

Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.

Actions ▲			New Student List
Rename		VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
Delete			
Upload Student List		Yes	0

Step 8: Use the dropdown to select which Student List you want to upload information to. Select confirm.

Select a Student List	Upload	Choose a Column	Complete

Upload File to Student List

Choose a list to add these students to

Test ▾   **Confirm**

Step 9: Select Choose File to upload your saved CSV Excel document. Click to upload the file.

Select a Student List	Upload	Choose a Column	Complete

Upload File to Student List

Please upload a .csv file containing a column of student IDs

Choose File   No file chosen

Click to upload the file

Step 10: Use the dropdown to pull the students into Navigate via their student ID. Click save.

Step 11: It will take a few minutes for the list to upload depending on the amount of data being pulled over. You will see the following screen.

Step 12: Select to view my student list. Select the list you want to view.

Step 13: You can return to the list at any time by selecting "Lists & Saved Items" from the menu bar on the right-hand side of the home screen.

Setting Availability in Navigate360

How to check and make sure your availability matches your campaign details.

This is a wonderful way to communicate with your Maroon/Gold Campaign students or to set up Program Planning. It will send communication to schedule an appointment, send nudges, and track who scheduled appointments.

Step 1: On the staff home, click on "My Availability"
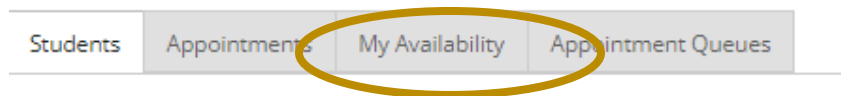
Step 2: Click "Action" to add a new time.

Step 3: Add your availability.

ADD AVAILABILITY   ✕

When are you available to meet?

Mon	Tue	Wed	Thu	Fri	Sat	Sun

From
8:00am

To
5:00pm

All times listed are in Eastern Time (US & Canada).

How long is this availability active?

A Range of Dates

Starting on
10/10/2022

Ending on
10/21/2022

If you only want to meet with students during select weeks for program planning, choose "A rang of dates" and add your time frame.

Add to your personal availability link?

☑ Add this availability to your personal availability link?

What type of availability is this?

Appointments	Drop-ins	Campaigns

Make sure to select Campaigns!

Meeting Type

✕ In Person   ✕ Virtual

You can select just 1 option or both.

Care Unit

How to Make an Appointment Campaign

Step 1: From the home screen select Campaigns from the menu bar on the left-hand side.

Step 2: Select Add New Appointment Campaign

Step 3: Set up Campaign and select continue.

Make sure the Care Unit, Location, and Service match your availability.

Maroon/Gold Campaign

Campaign Name: Maroon/Gold_Spring 2024_YourInitials

Care Unit: Faculty Office Hours

Location: Faculty/Professor's Office

Service: Maroon/Gold Campaign

Campaign Configurations

Campaign Name *

Maroon/Gold_Spring 2024_STJ

Instructions or Notes for Landing Page:

Care Unit: *

Faculty Office Hours

Location: *

Faculty/Professor's Office

Service: *

Maroon/Gold Campaign

Appointment Configurations

Appointment Limit: *

1

Appointment Length: *

30 min

Slots Per Time: *

1

☐ Allow Scheduling Over Courses

Staff Reminders:
☐ Email ☐ Text

Recipient Reminders:
☑ Email ☑ Text

Step 4: Add Recipients in Campaign. Open the Saved Searches tab. Click on the Student List and select your uploaded Maroon/Gold Campaign list. Click search at the bottom of the page to pull over the list. **See instructions about on how to upload an Excel file as a list.**

New Search

Saved Searches ▾

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

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?

Gender	Race or Ethnicity	Student List (In Any of These)	Transfer Student
All	All	All	Any

E-mail(s)	Category (In Any of these)?
	All ⊕

Tag (In Any of these)?

All ⊕

Enrollment History Enrollment Terms

Step 5: Add Recipients in Campaign

Select the checkbox next to Name to include all students and select continue.

Add Recipients To Campaign

Review Recipients in Campaign

Step 6: Select your name from "Available Staff" and keep "Include Appointment Availabilities checked.

Select Staff For Campaign

Step 7: On the "Compose Nudges" screen, click to add a welcome message. Here you will write your initial email that will include all the information and steps students need to take to make and come prepared for their appointment. You can now write your message and have it sent later.

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Welcome Message

There are currently no nudges

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipients scheduling all campaign appointments. The success message is for communication purposes only and will not be included in campaign metrics.

+ Add Success Message

No success message specified for this campaign.

Step 8: Verify & Start Campaign. Review all the details. Once you click "Start Campaign" your email will be sent (unless you chose a future date for it to send).

## Setting Up Outlook to Sync with Navigate

Your Navigate appointment availability syncs with your SU Outlook calendar. Below are frequent questions & mistakes that can impact a student's ability to schedule an appointment.

1. To avoid having students make an appointment with you at a certain time (examples: faculty meetings, doctor's appointments, lunch break) Place a "Hold" on your Outlook calendar during that time. Students cannot make appointments when there are already appointments on your Outlook calendar. To make a "hold" just add an appointment to your calendar at the time you do not want students to make an appointment. Make sure the appointment is marked as "busy." Navigate does not allow students to schedule appointments when you are teaching or when they are in class. However, be sure to block time to travel from the classroom back to your office.

No appointments can be made from 8-8:30, 12-1, or 2-3. Navigate automatically limits appointments to Monday-Friday.

Select "Busy" to block off time when you don't want students to make an appointment.
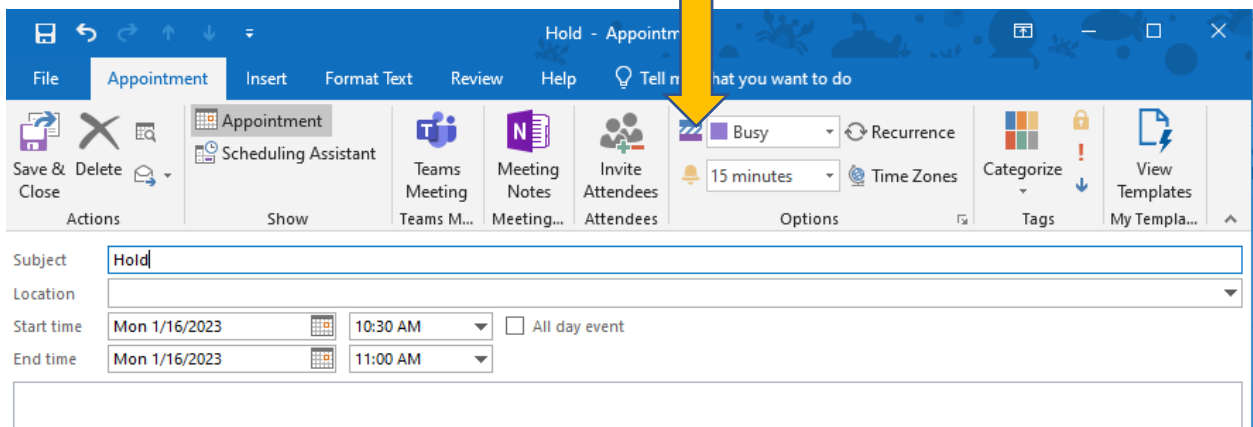
2. If you want to mark times that you are planning to hold appointments on your Outlook calendar, make sure to select "Free" on the "Show As" feature. This way, you are aware on your Outlook calendar that you will be meeting with students but Navigate will not take that time away as an option for students to meet with you.

The white side bar indicates that your Outlook "Show As" is marked as "Free"
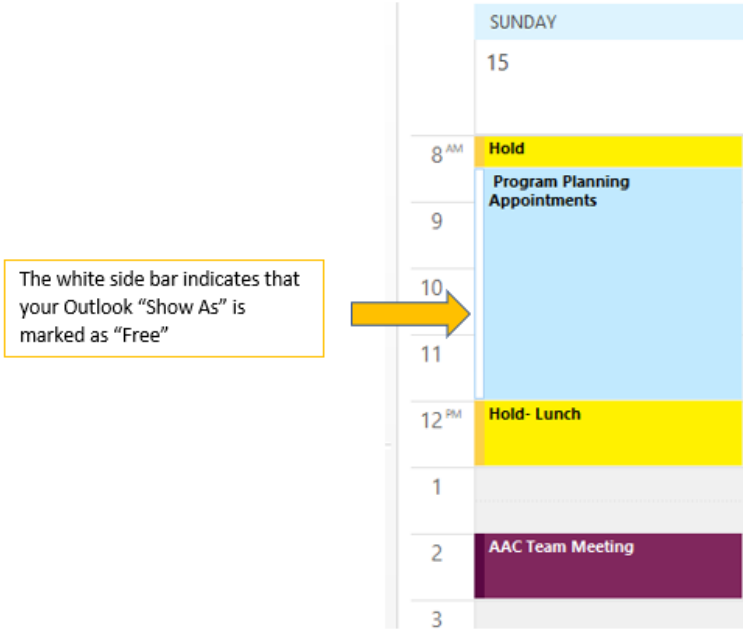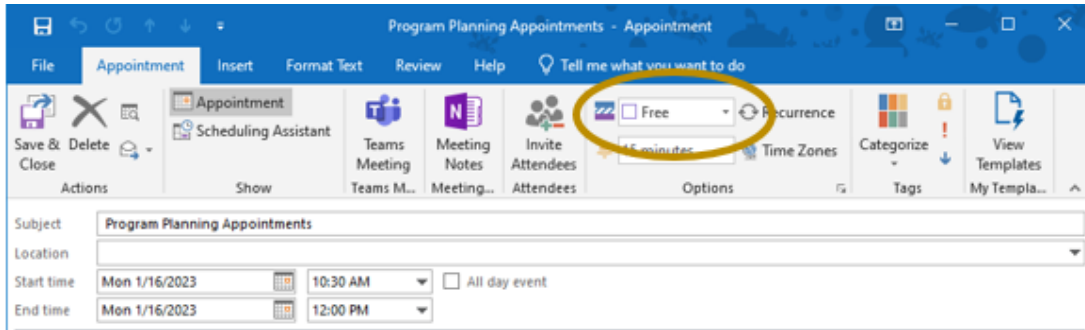
3. In rare occasions, a student will get a message saying there is no available appointments that fit in their schedule. If the campaign and availability are set right, the reason for the issue is that the student has class during all the faculty's availability. If this happens, the faculty will need to work with the student to schedule something outside of their Navigate availability.

Reporting on a Scheduled Student Appointment

Step 1: From Staff home, click on Appointments.
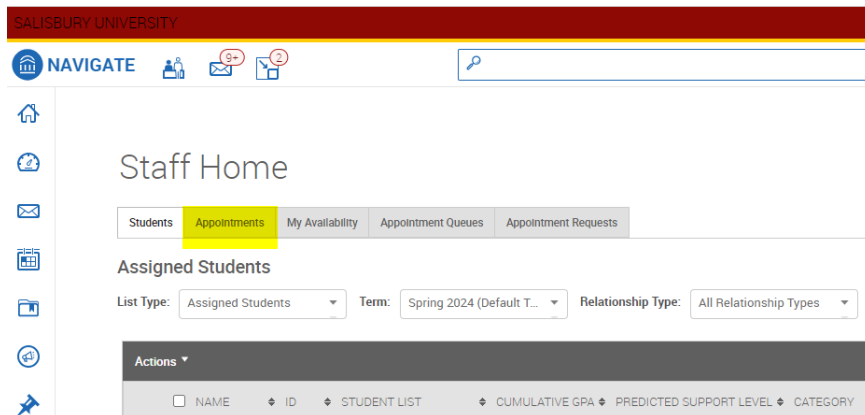
Step 2: Check the box of the student you just met with and want to create a report. Click on "Actions" and select "Add Appointment Summary."
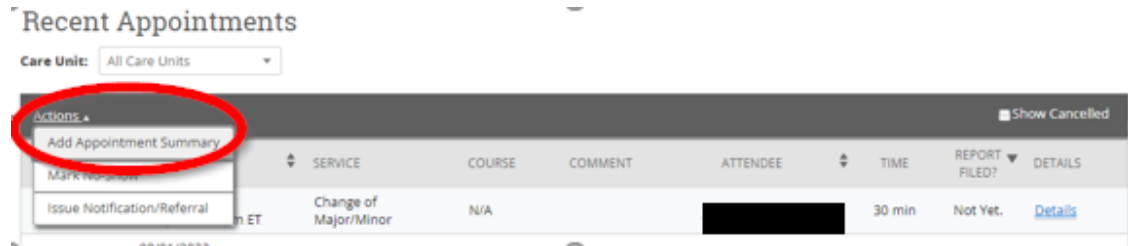
Step 3: Add your appointment summary.