

Navigate Resources: Alerts Campaign and Maroon/Gold Campaign
Spring 2024

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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:	<ul style="list-style-type: none"> • 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:	<ul style="list-style-type: none"> • # 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	



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_Referral Navigate360.mp4

Step 1: Log in to your [Navigate](#) account.

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

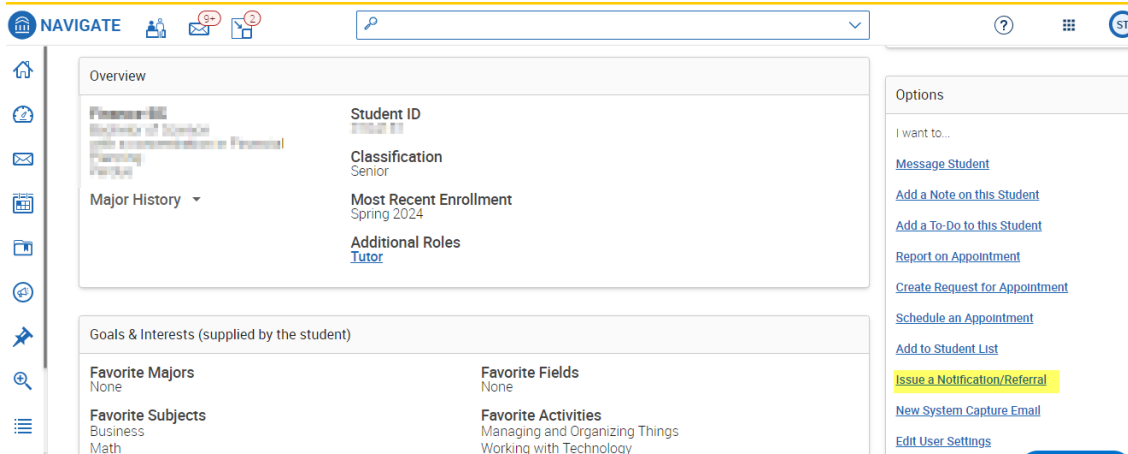
Issue a notification/referral from the home page.

Issue a notification/referral from the action button on your advisee (staff) or class (professor) list.

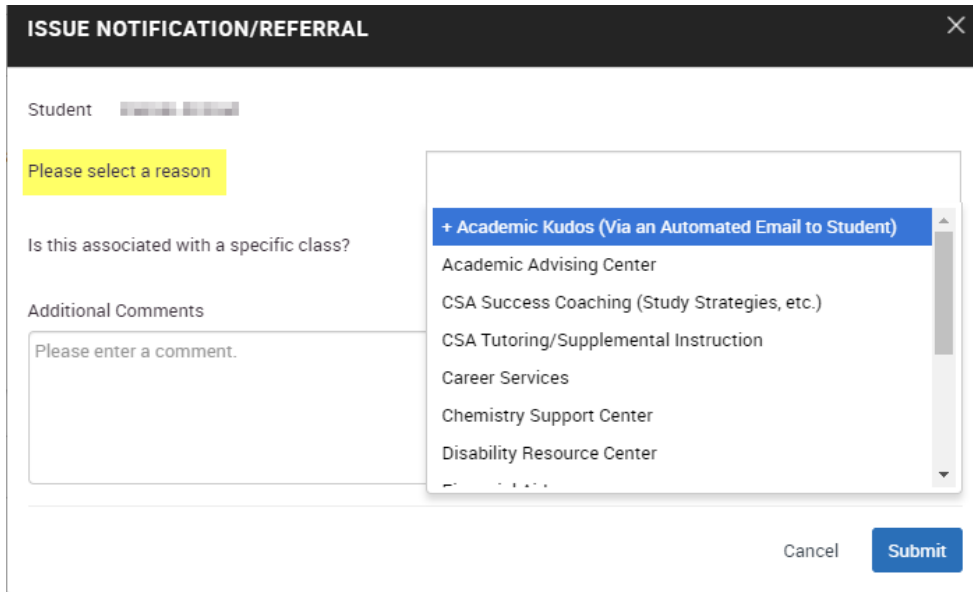
- a. Select the checkbox next to the student's name.

- 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.

The screenshot shows the 'ISSUE NOTIFICATION/REFERRAL' form. The 'Please select a reason' dropdown is set to 'Select at least one'. The 'Is this associated with a specific class?' dropdown is set to 'Optional'. The class selection dropdown is open, showing a search bar and a list of classes. The class 'BIOL-205-012-LAB FUND OF HUMAN ANAT & PHYS' is highlighted in yellow. Other classes listed include 'COMM-101-611-LEC INTRO TO HUMAN COMM STUDIES', 'BIOL-205-010-LEC FUND OF HUMAN ANAT & PHYS', and 'POSC-101-002-LEC INTRO TO POLITICS & GOVT'. The 'Additional Comments' section is empty.

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

The screenshot shows the 'ISSUE NOTIFICATION/REFERRAL' form. The 'Please select a reason' dropdown is set to 'Select at least one'. The 'Is this associated with a specific class?' dropdown is set to 'Optional'. The 'Additional Comments' section is highlighted in yellow and contains a text area with the placeholder 'Please enter a comment.'. The 'Cancel' and 'Submit' buttons are visible at the bottom right.

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)

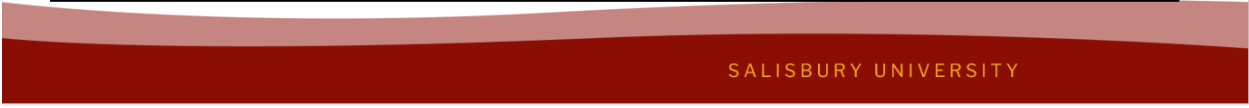
Additional Campus Resources
[Counseling Center](#)

[SU Cares](#)

Maroon/Gold Campaign

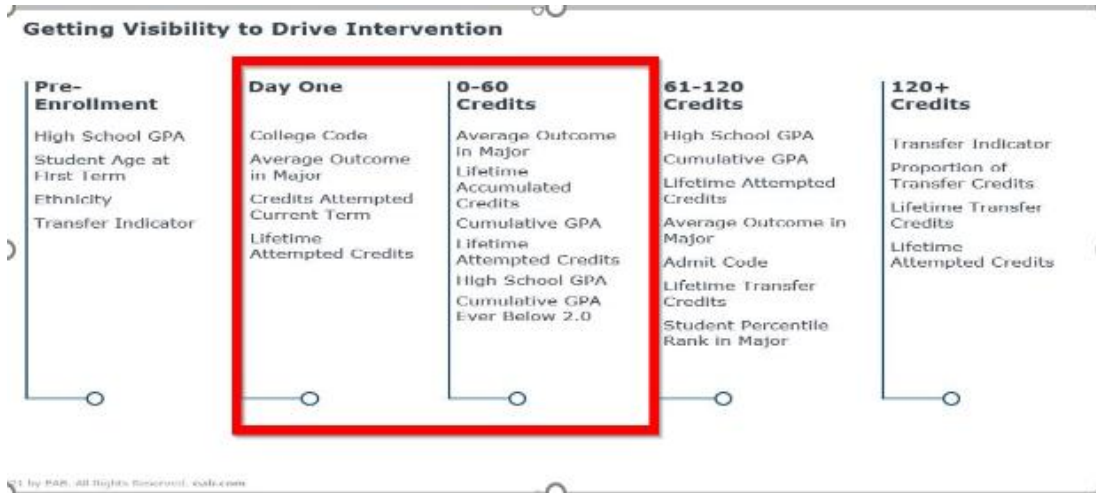
#2: Maroon/Gold Campaign

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:	<ul style="list-style-type: none"> • 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	



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.



How to Report on Appointment [Video Tutorial](#)

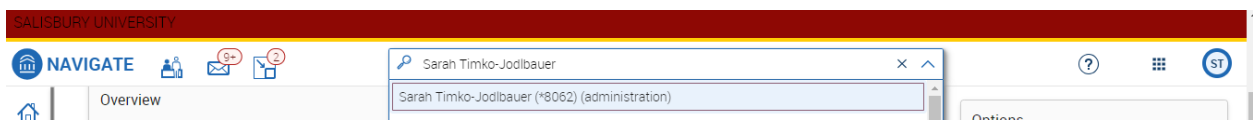


Report on Appointment.mp4

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.

Accounting-BS Bachelor of Science Perdue		Student ID [REDACTED]
		Classification Junior
		Most Recent Enrollment Spring 2024

Goals & Interests (supplied by the student)	
Favorite Majors None	Favorite Fields None
Favorite Subjects None	Favorite Activities None
	Favorite Resources None

Options I want to... Message Student Add a Note on this Student Add a To-Do to this Student Report on Appointment Create Request for Appointment Schedule an Appointment Add to Student List Issue a Notification/Referral New System Capture Email Edit User Settings Unload Profile Picture
--

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)

Appointment Details Care Unit Faculty Office Hours	Summary Details For Ashley Acevedo Assignments Discussed Objectives of the Session
Location Faculty/Professor's Office	Study Skills Used Goals for Next Session
Service Maroon/Gold Campaign	Student arrived on time and was ready to begin our session. <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A Student was prepared (attended class, read lesson, had notes, etc.)? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A Student asked for explanation of material not understood? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A Student responded positively to instruction (as you suggested)? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A Student was aware of future assignments? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A Student shows a better understanding of the material since our last session. <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
These services do not require course <input type="checkbox"/> Academic Major Questions <input checked="" type="checkbox"/> Maroon/Gold Campaign <input type="checkbox"/> Music Coaching	Appointment Summary B I [List Bulleted] [List Numbered] [Link] Paragraph
Date of visit 02/14/2024	

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

Additional Navigate360 Resources

Re-Sync Navigate to Outlook

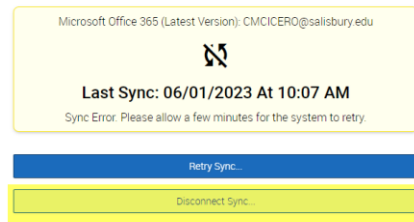
If you want to use Navigate to create appointments, make sure you are synced to your Outlook calendar. This way students are not able to schedule appointments during times you have your Outlook calendar marked as “busy.”

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.

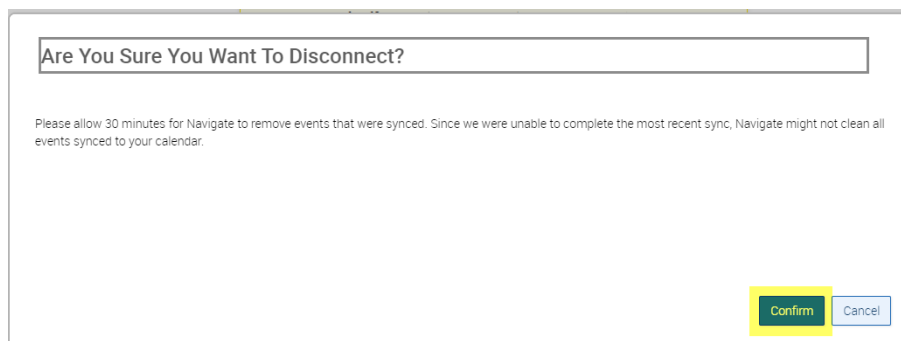


3. Select “Disconnect Sync.”

Calendar Settings

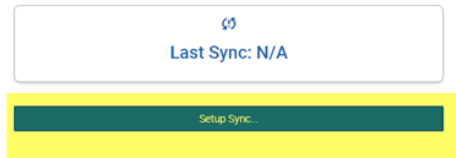


4. Select Confirm



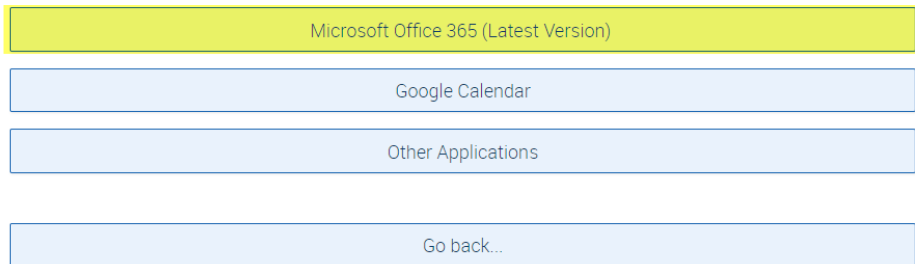
5. After 30 minutes, select Calendar Settings to re-sync to Microsoft Office 365. Select Setup Sync.

Calendar Settings

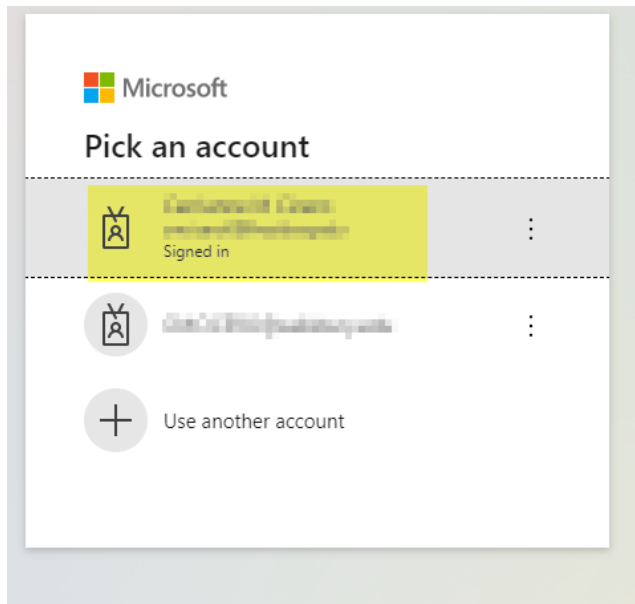


- 6. Select Microsoft Office 365.

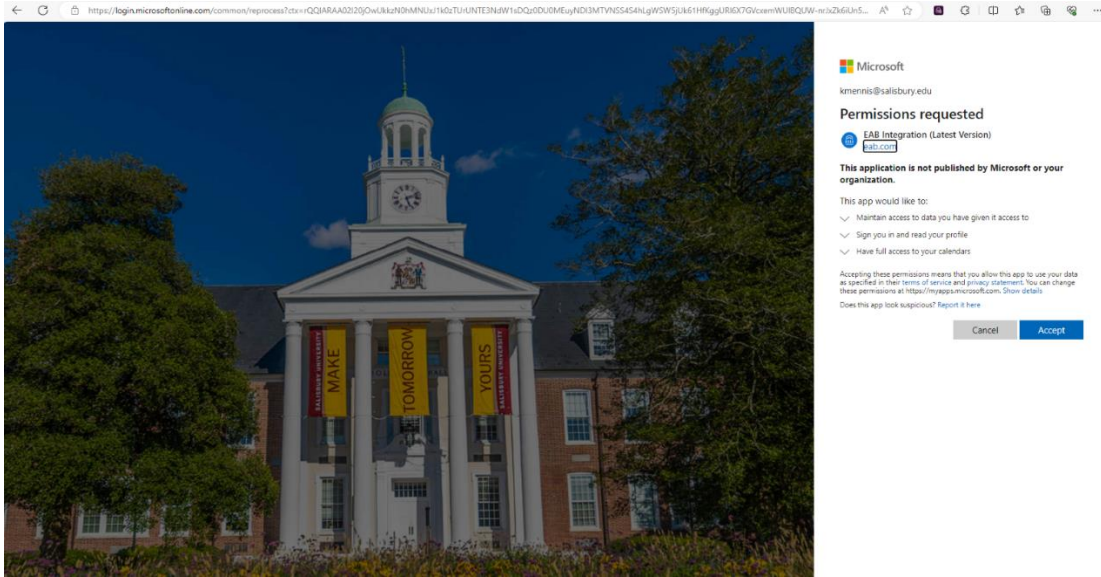
Please Choose Your Calendar Application:




- 7. Pick your account.



- 8. Select accept permission.



9. Select Retry Upgrade




It may take up to 30 minutes to upgrade your calendar to the latest Office 365 Sync.

Retry Upgrade...

Disconnect Sync...

10. Select Retry Sync

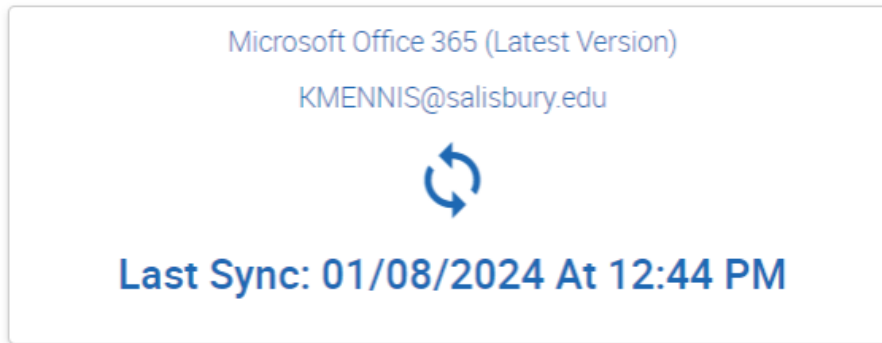
Microsoft Office 365 (Latest Version)
KMENNIS@salisbury.edu



Retry Sync...

Disconnect Sync...

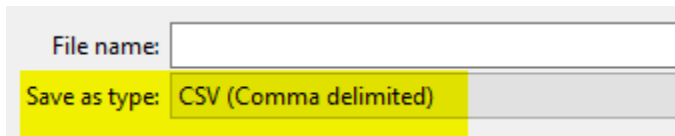
11. You should see the following screen when the sync is complete.



Upload an Excel List to Navigate

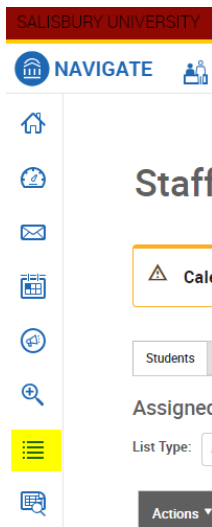
Lists provide an effortless way to communicate with students and to run Appointment Campaigns.

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



Step 2: Log in to your [Navigate](#) account.

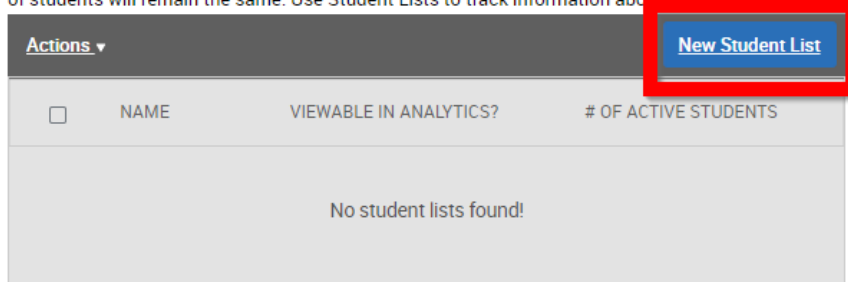
Step 3: Select "Lists & Saved Items" from the menu bar on the right-hand side of the home screen.



Step 4: Select “New Student List”.

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.



The screenshot shows a table with columns: NAME, VIEWABLE IN ANALYTICS?, and # OF ACTIVE STUDENTS. A 'New Student List' button is highlighted with a red box. Below the table, it says 'No student lists found!'.

Step 5: Name the student list and save the student list.

Adding New Student List

Name of Student List

Do not show this list in analytics dashboards?

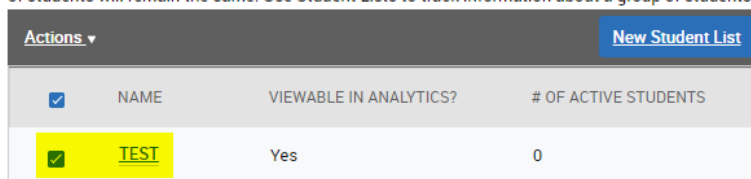
Save Student List

Step 6: Put a checkmark next to the list that you want to upload information to.

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.



The screenshot shows a table with columns: NAME, VIEWABLE IN ANALYTICS?, and # OF ACTIVE STUDENTS. A 'New Student List' button is visible. The first row is highlighted in yellow and has a checkmark in the first column.

<input checked="" type="checkbox"/>	NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input checked="" type="checkbox"/>	TEST	Yes	0

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.

	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<div style="border: 1px solid black; padding: 2px;"> Actions ▲ Rename Delete Upload Student List </div>	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.

Select a Student List
Upload
Choose a Column
Complete

Upload File to Student List

You've uploaded [FTS_2023_2024_Moderate_High_Support.csv](#) Choose a column to import as Student ID:

Student ID ▼

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.

Select a Student List
Upload
Choose a Column
Complete

Upload File to Student List

Success! The students have been added to [TEST](#)

Important: There may be a delay before all students appear in the list.

[View my Student Lists](#)

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

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		
	NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input type="checkbox"/>	TEST	Yes	351

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.

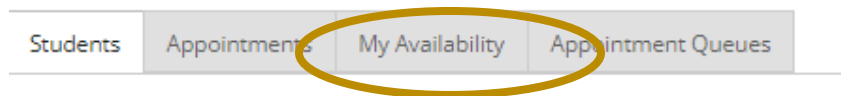
Setting Availability in Navigate360

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”

Staff Home ▼



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 To

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

How long is this availability active?

A Range of Dates

Starting on Ending on

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

In Person Virtual

Care Unit

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

Make sure to select Campaigns!

You can select just 1 option or both.

ADD AVAILABILITY [X]

Meeting Type
 In Person Virtual

Care Unit
Faculty Office Hours

Location
Faculty/Professor's Office

Services
 Maroon/Gold Campaign Make sure this matches exactly what you put in your campaign.

URL / Phone Number

Special Instructions for Student

B *I* [List Bulleted] [List Numbered] [Undo] [Redo]

Write your instructions for students here (you will also include this in your initial nudge, but they will see this when they book the appointment).

- Office Location

Cancel Save

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

How to Make an Appointment Campaign

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

SALISBURY UNIVERSITY

NAVIGATE

Staff Home

Calendar Sync is blocked. Sy

Students Appointments My Availability

Assigned Students

List Type: Assigned Students

Step 2: Select Add New Appointment Campaign

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New

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

Actions ▾

<input checked="" type="checkbox"/> NAME
<input checked="" type="checkbox"/> Melissa Allen
<input checked="" type="checkbox"/> Melinda Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown
<input checked="" type="checkbox"/> Melissa Brown

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

Select Staff For Campaign

Available Staff

Include Appointment Availabilities ?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Carrienne Cicero	


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

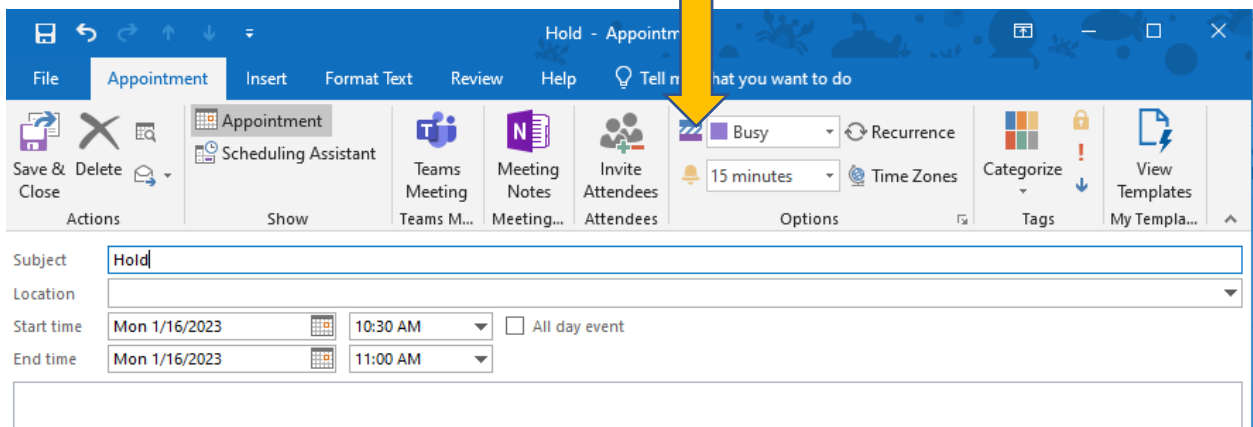
Your Navigate appointment availability syncs with your SU Outlook calendar. Below are frequent questions & mistakes that can impact a student’s ability to schedule an appointment.

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.

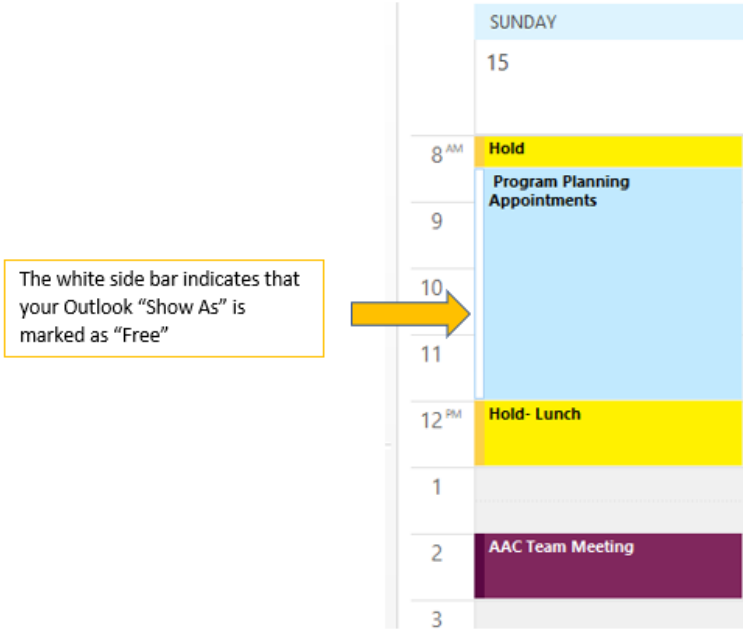
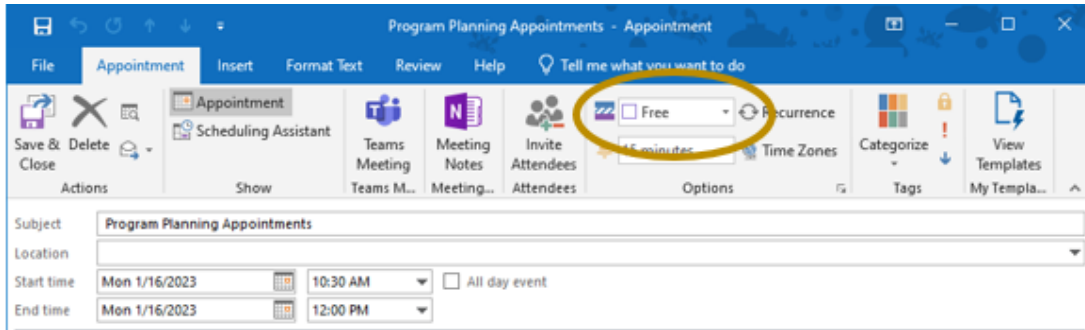
15	
8 AM	Hold
9	
10	
11	
12 PM	Hold- Lunch
1	
2	AAC Team Meeting
3	
4	
5	

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.



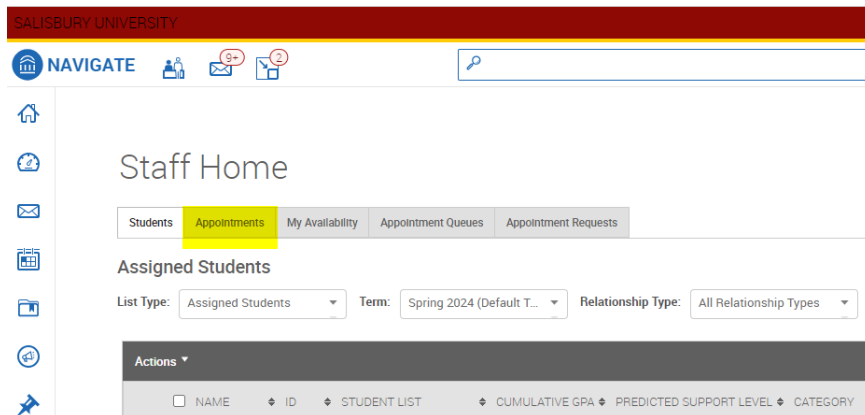
- If you want to mark times that you are planning to hold appointments on your Outlook calendar, make sure to select "Free" on the "Show As" feature. This way, you are aware on your Outlook calendar that you will be meeting with students but Navigate will not take that time away as an option for students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



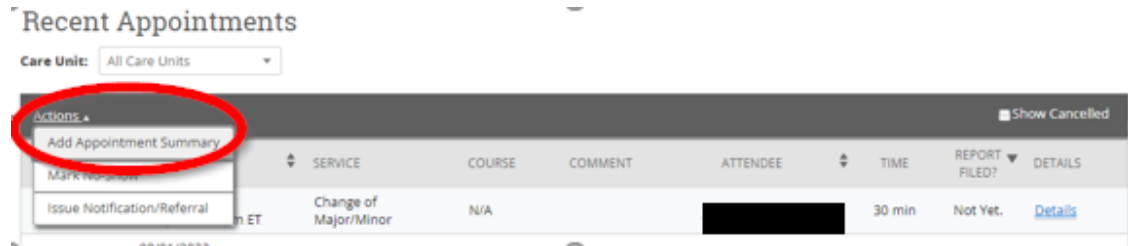
3. In rare occasions, a student will get a message saying there is no available appointments that fit in their schedule. If the campaign and availability are set right, the reason for the issue is that the student has class during all the faculty's availability. If this happens, the faculty will need 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.

Appointment Details

Care Unit: Faculty Office Hours

Location: Faculty/Professor's Office

Service: Maroon/Gold Campaign

Academic Major Questions

Maroon/Gold Campaign

Music Coaching

Date of visit: 02/14/2024

Summary Details For Ashley Acevedo

Assignments Discussed: [REDACTED]

Objectives of the Session: [REDACTED]

Study Skills Used: [REDACTED]

Goals for Next Session: [REDACTED]

Student arrived on time and was ready to begin our session. Yes No N/A

Student was prepared (attended class, read lesson, had notes, etc.)? Yes No N/A

Student asked for explanation of material not understood? Yes No N/A

Student responded positively to instruction (as you suggested)? Yes No N/A

Student was aware of future assignments? Yes No N/A

Student shows a better understanding of the material since our last session. Yes No N/A

Appointment Summary

B I | [REDACTED] | Paragraph | [REDACTED]

[REDACTED]