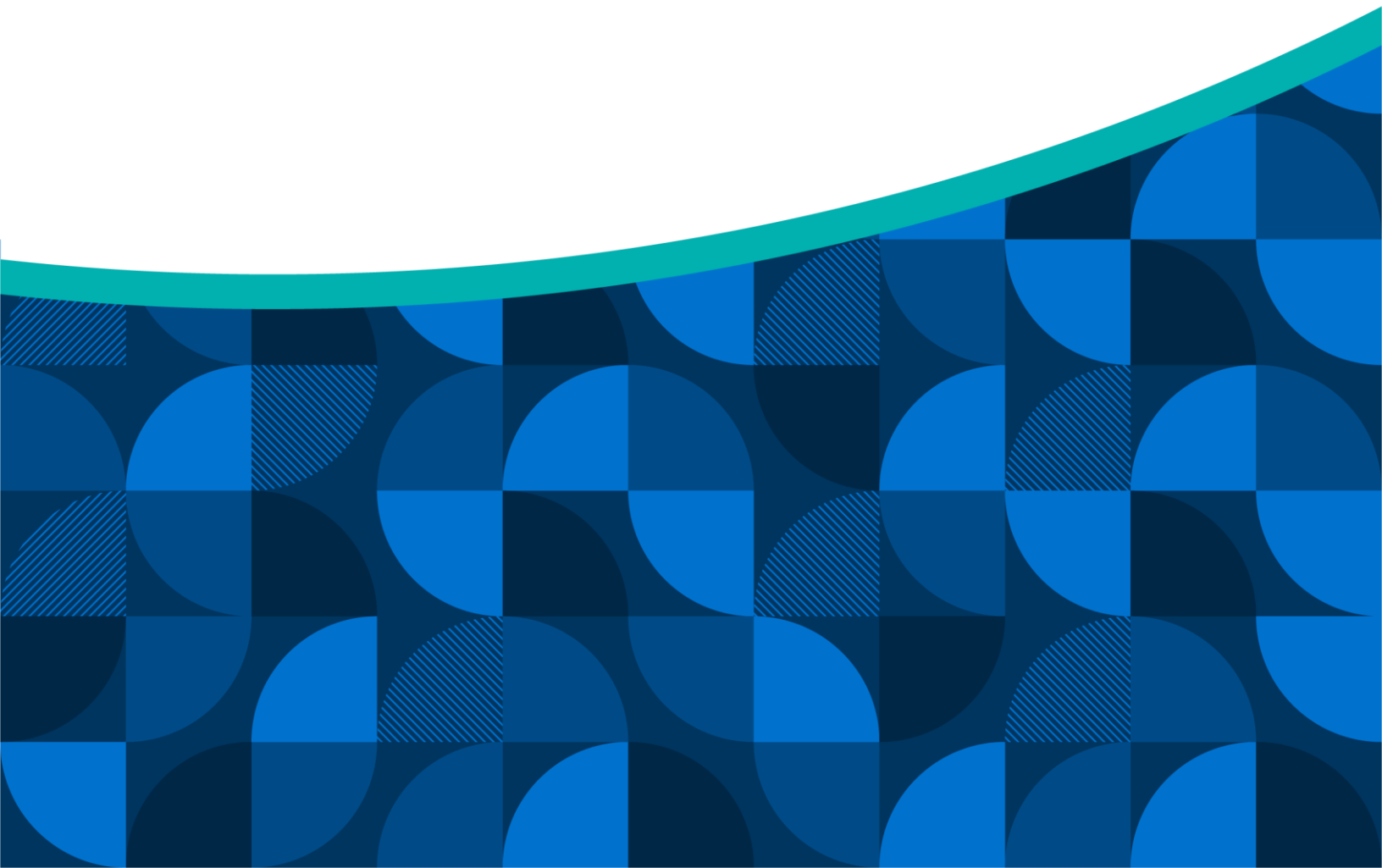




PARTNER RESOURCE

Integrating Offices and Units Across Campus

Pathways for Optimizing Utilization, Expansion,
and Outcomes of Your **Navigate360 CRM**



Bringing **Accessibility Services** Into Navigate360



Why?

Accessibility and accommodation options help pave the way for equitable and inclusive student success initiatives. Through integration of these processes in Navigate360, students and staff have easier access to appropriately referenceable accommodation supports and referrals within the broader network of student success and holistic care practices.

Note: The Navigate360 platform is not HIPAA compliant.

Potential Users

- Dean of Students
- Director of Accommodations
- Accessibility Coordinator

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and inclusive practices

- Student profile
- Notes
- Summary reports
- Risk indicators

MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to **pull lists of students to message** about:

- Logistics of accommodation plans
- Communicating accommodations to faculty at the beginning of the term



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Testing Center utilization
- Adaptive technology and/or supply check-outs
- Sensory Room utilization



SCHEDULING & RECORDING APPOINTMENTS

Allow students to schedule appointments with staff, including Accessibility Coordinator

- Use Appointment Campaigns** to facilitate sign ups for:
- Accommodation intake meetings
 - Term-to-term accommodation review and renewal processes



COORDINATING CARE & CASE MANAGEMENT

Allow students to self-identify, such as starting a request to discuss accommodations, through the Hand Raise feature

Issue or receive Alerts for student concerns, including feedback from faculty through progress reports or initiating referrals



ANALYZING WITH REPORTING & ANALYTICS

- Track usage of resources and services
- Evaluate types of students being engaged (or not) by programs, outreach, and activities, including term-to-term supports and patterns
- Assess programmatic impact on student outcomes (e.g., retention)
- Monitor overall insights



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Athletics** Into Navigate360



Why?

Student-athletes often face unique challenges that can impact their academic success and overall well-being. By providing dedicated support through Athletics, institutions can help student-athletes balance their athletic and academic commitments, Navigate360 eligibility and compliance issues, and access resources that support their physical and mental health.

Potential Users

- Director of Athletics
- Coach
- Student-Athlete Advisor
- Peer Tutor

Options for Engaging Through Navigate360

VIEWING STUDENT DATA

View a student's courses and academic performance including high school and transfer data

Access an athlete's success network to know who to connect to for support

Gain insights into an athlete's holistic experience and potential areas of concern by seeing engagement

MANAGING COMMUNICATIONS WITH STUDENTS

Create Watch Lists to monitor students of concern (e.g., students GPAs close to probation)

Use Appointment Campaigns to schedule meetings with special athlete populations (e.g., first-year check-ins, academic warning)

TRACKING CHECK INS & STUDENT TRAFFIC

Use the kiosk to swipe students in for study hall to track completion of required hours

Easily access student usage of **Tutoring or Peer Education resources**, if also in Navigate360

SCHEDULING & RECORDING APPOINTMENTS

Allow student to schedule appointments with staff, including Advisors, Coaches, and Peer Tutors

Use Appointment Campaigns to facilitate sign ups for advising meetings, check ins with Coaches, and other key touchpoints

COORDINATING CARE & CASE MANAGEMENT

Collect Progress Reports from faculty as part of eligibility requirements

Use Alerts to flag students who need interventions from advisors, support staff, or other resources

Automatically e-mail or assign cases to Coaches or Athletics Coordinators for athletes with certain types of alerts

ANALYZING WITH REPORTING & ANALYTICS

- View participation on student profiles to flag unengaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., retention, eligibility)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities

To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Career Services** Into Navigate360



Why?

Integrating Career Services in Navigate360 ensures that students have access to comprehensive career support, including career exploration, job search assistance, employer connections, and alumni engagement through a commonly used platform. It facilitates data-driven decision-making and helps institutions align career services alongside student success initiatives.

Potential Users

- Director of Career Services
- Career Advisor
- Internship Advisor

Options for Engaging Through Navigate360

VIEWING STUDENT DATA

View a student's course history and academic performance to prepare for student meetings

Gain insight into student's career goals and interests using feedback from Navigate360 Student



MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to pull major- or interest-specific lists of students to message

E-mail or text students about:

- career events and programming
- internship opportunities aligned with their programs
- networking opportunities



TRACKING CHECK INS & STUDENT TRAFFIC

Use the Kiosk to swipe students into your office to:

- Track usage of services
- Show advisors/support staff which students are visiting your office on student profile



SCHEDULING & RECORDING APPOINTMENTS

Allow students to schedule appointments, potentially including:

- resume review
- internship assistance
- mock interview

Document student interactions

Use Appointment Campaigns for sign ups for group workshops or trainings



COORDINATING CARE & CASE MANAGEMENT

Uses Cases to receive referrals for students in need of Career Counseling and track follow up

Collaborate with advisors on decision making about majors and career goals



ANALYZING WITH REPORTING & ANALYTICS

- View participation on student profiles to flag un-engaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., retention)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing the **Counseling Center** Into Navigate360



Why?

Mental health is an increasingly critical component of student success initiatives. Embedding mental health promotion and prevention pathways into Navigate360 can help support coordinated care practices, destigmatize communication about mental health, and advance student help-seeking behavior.

Note: The Navigate360 platform is not HIPAA compliant.

Potential Users

- Academic Advisors
- Counseling Staff
- Dean of Students
- Vice President of Student Affairs

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and, as needed, triangulation of information from:

- Student profile
- Alerts
- Notes
- Summary reports
- Risk indicators

MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to **pull broad lists of students to message** about:

- Campus-wide services, including wellness and self-care initiatives
- Affinity-based opportunities and programming



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Student organization programming and outreach participation
- Event or program attendance

SCHEDULING & RECORDING APPOINTMENTS

Allow students to schedule appointments with staff or student ambassadors, including overview meetings about the range of available services

Use Appointment Campaigns to facilitate sign ups for promotion and prevention events and activities



COORDINATING CARE & CASE MANAGEMENT

Invite students to self-identify their concerns (e.g., "I am experiencing grief") through the Hand Raise feature

Auto-assign Peer Mentors or other liaisons as part of stepped care programming

Issue Alerts for student concerns or initiate referrals to fellow support offices

ANALYZING WITH REPORTING & ANALYTICS

- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., persistence, retention)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Financial Aid** Into Navigate360



Why?

Integrating the Financial Aid team into Navigate360 can help institutions streamline tracking of student interactions, understand impact of financial aid support programs, identify areas for improvement, and make data-driven decisions about optimizing financial aid processes in support of student outcomes. Heightened cross-campus collaboration within the same technology further aligns metrics for demonstrating institutional effectiveness and accountability processes.

Potential Users

- Director of Financial Aid
- Financial Aid Counselor

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and preparation for student interactions:

- Student profile
- Alerts
- Notes
- Summary reports
- Risk indicators

MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to pull lists of students to message about:

- FAFSA Renewal
- SAP Appeal

Use e-mail or text messaging to send reminders to students about key deadlines (e.g., FAFSA, Scholarships)



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Usage of services
- Showing advisors/support staff which students are visiting your office
- Attendance at large group workshops or trainings (e.g., financial literacy)

SCHEDULING & RECORDING APPOINTMENTS

Allow students to schedule appointments for specific services
Examples: loan questions, scholarship questions, pay my bill, etc.

Document student interactions

Use appointment campaigns to encourage special populations who need to schedule meetings (e.g., FAFSA, SAP, Hold related)



COORDINATING CARE & CASE MANAGEMENT

Establish an Alert Reason for students with Financial Concerns or Holds

Allow students to self-identify their concerns (e.g., "I need help paying for school") through the Hand Raise feature

Use Cases to receive referrals for students with financial concerns and track follow up

ANALYZING WITH REPORTING & ANALYTICS

- View participation on student profiles to flag un-engaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., retention)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Library Services** Into Navigate360



Why?

Library Services are crucial to student success initiatives and, like many resources, have the potential to go underutilized. Integrating the campus library(ies) into Navigate360 supports seamless access and referrals to the wealth of academic resources available to students, including critical student success supports and supplemental guidance.

Potential Users

- Librarians
- Academic Advisors
- Success Coaches
- First Year Success Course Instructors

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and outreach opportunities:

- Student profile
- Course enrollment
- Notes
- Summary reports

MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to **pull lists of students to message** about:

- Events and activities
- Discipline-specific resources and services
- Thesis and dissertation supports
- Special collections and new acquisitions



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Study room utilization
- Learning community and study table sessions
- Adaptive technology utilization

SCHEDULING & RECORDING APPOINTMENTS

Allow students to schedule appointments with staff, including assigned or on-call liaisons

Facilitate room reservations for individual or group study sessions

Use Appointment Campaigns for recurring activities, such as First Year Experience research requirements



COORDINATING CARE & CASE MANAGEMENT

Auto-assign discipline- or cohort-specific liaisons to support students

Allow students to self-identify their concerns (e.g., "I need help finding a resource") through the Hand Raise feature

Issue Alerts for student concerns or initiate referrals to fellow support offices



ANALYZING WITH REPORTING & ANALYTICS

- Monitor attendance trends and high-volume periods
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., retention)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Residence Life** Into Navigate360



Why?

Residence Life staff members have a unique understanding of the challenges and opportunities that students face while living on campus. By working in Navigate360, they can use this knowledge to address the specific needs of their residents, including academic, personal, and social support. Bringing these interactions in to a centralized system like Navigate360 allows for coordinated insights and efforts by offices across your campus, leading to better outcomes.

Potential Users

- Residence Life Director
- Area Coordinator
- Resident Advisor
- Front Desk Staff

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Gain a holistic view of your students to support daily work and/or associated CARE, BIT, or Conduct team efforts:

- Academic History
- Student Attributes
- Alerts
- Appointment Reports
- Risk indicators
- Expressed interests from **Student App**

MANAGING COMMUNICATIONS WITH STUDENTS

Use Search Filters to pull lists of students to message about campus events & involvement opportunities such as:

- Residence Hall Programs
- Student Organizations
- Programs for Special Populations

Add checklist to apply for student housing into **Student App**



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation at campus events and locations:

- Residence Hall Programs
- Visits to Student Life Offices
- Programming Board events

SCHEDULING & RECORDING APPOINTMENTS

Allow student to schedule appointments with staff, including RAs and/or Conduct personnel

Use Appointment Campaigns to facilitate sign ups for meetings, interviews, or standard appointments:

- Key pick up
- Room check out

Document student interactions



COORDINATING REFERRALS & CASE MANAGEMENT

Issue Alerts for student concerns or initiate referrals to fellow support offices

Auto-assign Dean of Student or Director of Residence Life to manage personal or elevated student cases

Allow students to self-identify their concerns (e.g., roommate conflict) through the Hand Raise feature

ANALYZING WITH REPORTING & ANALYTICS

- View participation at key events to flag unengaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., retention)
- Evaluate types of students engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Student Affairs** Into Navigate360



Why?

By harnessing the power of Navigate360, student affairs staff have another tool for cultivating a student-centric environment, leveraging early intervention strategies, fostering a culture of collaboration, maximizing the impact of available resources, harnessing the potential of data analytics, and paving the way for a thriving campus community.

Potential Users

- Dean of Students
- Director of Student Organizations
- Orientation Leaders

Options for Engaging Through Navigate360

VIEWING STUDENT DATA

Leverage key features to support daily work and holistic insights about the student experience:

- Student profile
- Alerts
- Notes
- Summary reports
- Risk indicators



MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to pull lists of students to message about:

- Student Organizations
- Programs for Special Populations
- Leadership development opportunities



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Welcome Week activities
- Student Organization fair
- Student Government programming
- Group fitness classes
- General event attendance



SCHEDULING & RECORDING APPOINTMENTS

Allow student to schedule appointments with staff, including student organization advisors

Use Appointment Campaigns to facilitate sign ups for meetings, interviews, or standard appointments:

- Orientation Guide interviews
- Student Government campaigns



COORDINATING CARE & CASE MANAGEMENT

Issue Alerts for student concerns or initiate referrals to fellow support offices

Allow students to self-identify their concerns or interests (e.g., "I need help meeting new people") through the Hand Raise feature



ANALYZING WITH REPORTING & ANALYTICS

- View participation on student profiles to flag un-engaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., belonging, retention)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing **Tutoring** Into Navigate360



Why?

Tutoring resources provide personalized attention, academic coaching and individual attention to students to improve their grades, stay engaged, and achieve their academic goals. By leveraging their ability to provide detailed outcomes from student interactions, bringing tutoring resources into Navigate360 allows for coordinated insights across your campus, supporting student outcomes.

Potential Users

- Peer Tutor
- Director of Learning Center
- Director of Math Center
- Faculty Liaison

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and preparation for or building of context for sessions:

- Student profile
- Alerts
- Notes
- Summary reports
- Risk indicators

MANAGING COMMUNICATIONS WITH STUDENTS

Create Watch Lists for students who are on academic probation or close to it in the "Murky Middle"

Run targeted campaigns for students in need of support, such as students:

- Enrolled in high DFW courses
- With lower midterm grades
- At certain GPA ranges



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation at certain locations or types of activities:

- Academic Support Workshops
- Group Session
- Supplemental Instruction session
- Drop in tutoring

SCHEDULING & RECORDING APPOINTMENTS

Use Appointment Campaigns for sign ups for large group workshops or trainings

Allow Tutors to set their own availability or coordinate it centrally

Allow for students to schedule appointments or drop in for support with subject- or course-based options



COORDINATING CARE & CASE MANAGEMENT

Issue Alerts for student concerns, such as "Tutoring Encouraged"

Use automatic e-mail notifications to provide instructions to students on how to receive support or schedule

Allow students to self-identify their concerns (e.g., "I need help in a class") through the Hand Raise feature

ANALYZING WITH REPORTING & ANALYTICS

- View participation on student profiles to flag un-engaged students
- Monitor attendance trends
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., DFW rates)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!

Bringing the **Writing Center** Into Navigate360



Why?

Writing Center consultants provide personalized attention and directive, supportive coaching to enhance students' writing abilities and expertise. By leveraging the ability to track student interactions and more seamlessly facilitate communication and logistics, Writing Center integration in Navigate360 helps ensure more students have access to this critical skill development.

Potential Users

- Writing Center Director
- Peer Consultants
- English Department
- Academic Advisors
- FYE Course Instructors

Options for Engaging Through Navigate360



VIEWING STUDENT DATA

Leverage key features to support daily work and student engagement opportunities:

- Student profile
- Notes
- Summary reports
- Alerts

MANAGING COMMUNICATIONS WITH STUDENTS

Use Categories or Search Filters to **pull lists of students to message** about:

- Recommended utilization based on current course enrollment
- Workshops and serial programming
- Author events or other special activities



TRACKING CHECK INS & STUDENT TRAFFIC

Use Kiosk card-swipes to track participation such as:

- Space and community utilization
- Drop in consulting requests
- Technology utilization



SCHEDULING & RECORDING APPOINTMENTS

Allow student to schedule appointments with staff, including Peer Consultants

Use Appointment Campaigns to facilitate sign ups for meetings or standard appointments:

- First Year Experience opportunities
- English Composition sequence meeting requirements



COORDINATING CARE & CASE MANAGEMENT

Allow students to self-identify their concerns (e.g., "I need help with a term paper") through the Hand Raise feature

Auto-assign Peer Consultants to specific student cases

Issue Alerts for student concerns or initiate referrals to fellow support offices



ANALYZING WITH REPORTING & ANALYTICS

- Monitor attendance trends, including high volume times of day and term
- Track usage of resources and services
- Assess programmatic impact on student outcomes (e.g., grades in target courses, persistence)
- Evaluate types of students being engaged (or not) by programs, outreach, and activities



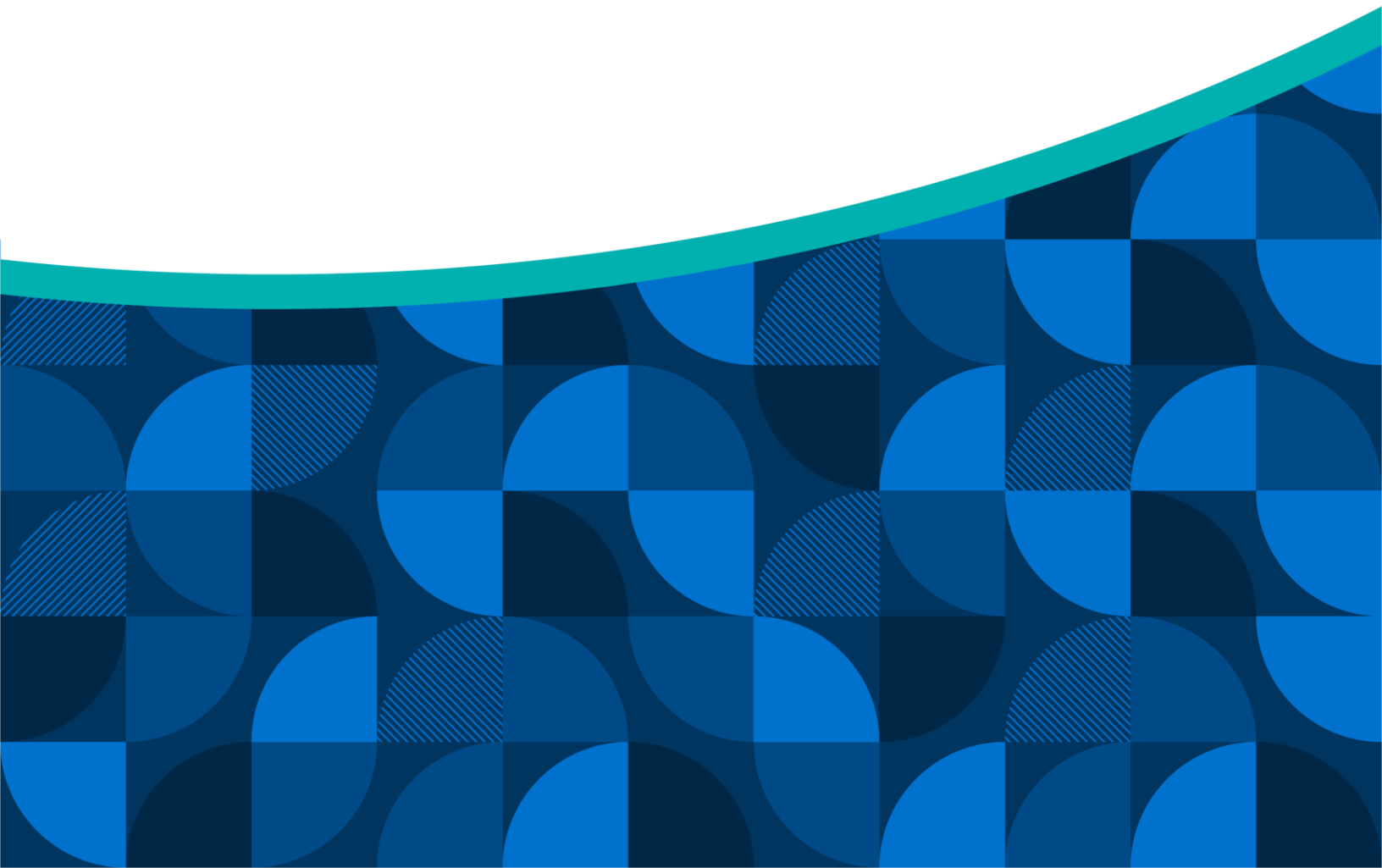
To **learn more**, reach out to your **Launch Consultant** or **Strategic Leader**!



PARTNER RESOURCE

Integrating Offices and Units Across Campus

Next Steps and Privacy Considerations for Expanded Use of the **Navigate360 CRM**



Bringing New Offices Into Navigate360

Next Steps for Implementation

1

Identify a point person or project manager

This individual should be a representative of the office that you are bringing in to Navigate360 and will design workflows in Navigate360 and expectations for use with the needs of their office. This individual will serve as a member of the Navigate360 Leadership Team in the role of 'Care Unit Lead'.

2

Determine what functionality you would like to use.

Click the below links to view Navigate360 demos. You must be logged in to Navigate360 and the Help Center to click the links.

- [Viewing student data](#)
- [Managing student communications](#)
- [Tracking check-ins](#)
- [Scheduling](#) and [Managing](#) Appointments
- [Coordinating Referrals and Case Management](#)
- [Analyzing with Reports & Analytics](#)

3

Planning to use Appointment Scheduling or Check Ins? Set up and test configurations

Launching Appointment scheduling and Check-Ins in Navigate360 will require additional configurations (Care Units, Services, Locations) and pre-work from staff (Availability and Calendar Sync). Set up time with your campus' Application Administrator to determine next steps.

4

Review end-user Profiles and Permissions

All Navigate360 users must have a profile in order to log in. Additionally, the permissions associated with their profile will determine what that user can see or do in Navigate360. Ensure that your end-users have appropriate permissions that both enable them to accomplish necessary workflows and are also in line with campus policies.

5

Schedule and conduct trainings

Communicate clear expectations for use during your trainings. Share where your end users can go with questions or for additional support. Use the below linked EAB resources to get started. You must be logged in to Navigate360 and the Help Center to click the links.

- [Download the Navigate360 Quick Start Guide](#)
- [Download sample Navigate360 Lesson Plans](#)

6

Identify a timeline for assessment, optimizations, and potential expansion of use.

Determine annual plan for review of data-driven insights and usage patterns. Consider revisiting practices and configurations on an annual basis.

Quick Reference Guide

EAB Navigate360 and Student Privacy

Using Navigate360 for student health related workflows? Consider the following general and care unit-specific recommendations as you assess or establish your processes. **Remember: Navigate360 is not a HIPAA-compliant technology.** However, used appropriately, the platform's key functionalities provide a valuable way to reach and support students' success and wellbeing on campus.

Each institution's policies and practices differ – some of these recommended workflows will work for you while others may go beyond your institution's comfort zone. **Ultimately, it is your institution's responsibility to determine how Navigate360 utilization is governed in accordance with your policies and practices.** Consult your institution's subject matter experts, including general counsel, health professionals, division leads, and Navigate360 team leads to determine what is right for your campus.

Role and Care Unit Configurations to Support Student Privacy

<i>Role Recommendations</i>	<ul style="list-style-type: none"> • Create new roles to limit who can see and do things within a care unit that you want to be kept private • Consider enabling Email Privacy Protection for roles supporting high privacy care units to prevent messages from being seen by others. When this is enabled, the text of emails will not be saved in the platform, though it will be recorded that an email was sent.
<i>Care Unit Recommendations</i>	<ul style="list-style-type: none"> • Care Unit specific categories: Categories can be assigned to specific care units and users must have a role that gives them permission to view categories in that care unit to see them. You can also restrict if the category should be visible in Analytics • Care Unit specific alerts: Alert reasons can be controlled at the Care Unit level and the ability to create and view alerts is permission-based by user role. Referrals to high privacy care units or alerts raised within them can thus be restricted.

General Guidance

RECOMMENDED

- ✓ Be mindful of Navigate360 user permissions: Super Users on your campus – typically App Admins or other member of the Navigate360 Leadership Team – can see information that is restricted or marked private by a Care Unit or individual user.
- ✓ Understand the “why” for tracking items with tags/categories in Navigate360. If you can't articulate the value proposition of a tag for student success, it probably should not go in the platform.

NOT RECOMMENDED

- ✗ Enter any identifiable private health information – such as a diagnosis - in any way, like notes, appointment summaries, categories, or tags.



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ABOUT EAB

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