

# Using Navigate to Support Outreach and Student Care

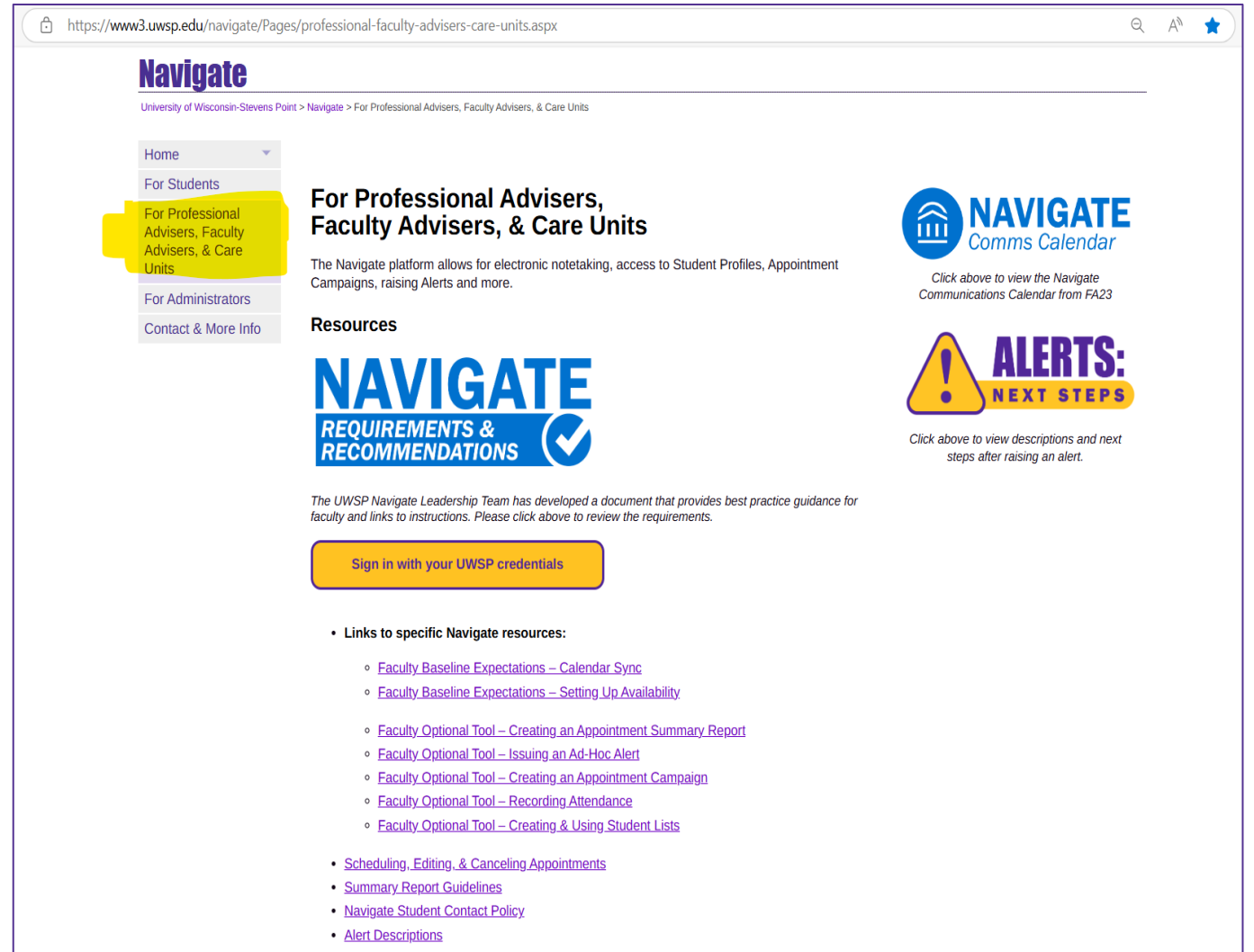
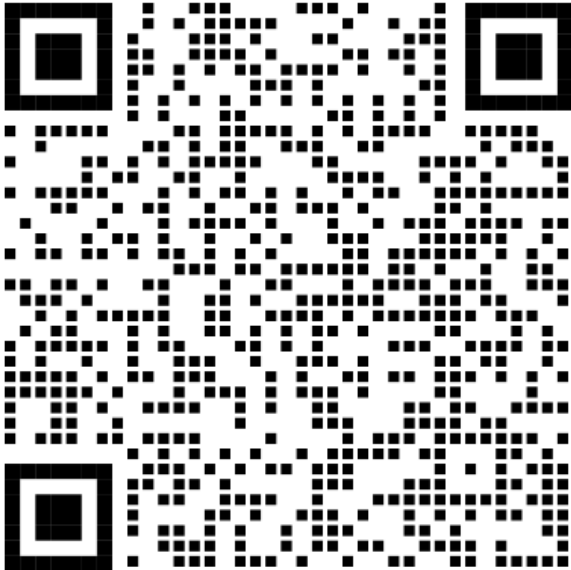


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# What is Navigate?

- Launched to UWSP in 2019; “a collaborative student success platform designed to transform the student experience through personalized and interactive support.”
- All UW campuses except Madison
- ACAC est. 2018



The screenshot shows the Navigate website interface. At the top, the URL is <https://www3.uwsp.edu/navigate/Pages/professional-faculty-advisers-care-units.aspx>. The page title is "Navigate" with the subtitle "University of Wisconsin-Stevens Point > Navigate > For Professional Advisers, Faculty Advisers, & Care Units". A navigation menu on the left includes "Home", "For Students", "For Professional Advisers, Faculty Advisers, & Care Units" (highlighted in yellow), "For Administrators", and "Contact & More Info". The main content area features the heading "For Professional Advisers, Faculty Advisers, & Care Units" and a sub-heading "REQUIREMENTS & RECOMMENDATIONS" with a checkmark icon. Below this is a "Sign in with your UWSP credentials" button. A list of links to specific Navigate resources is provided, including "Faculty Baseline Expectations – Calendar Sync", "Faculty Baseline Expectations – Setting Up Availability", "Faculty Optional Tool – Creating an Appointment Summary Report", "Faculty Optional Tool – Issuing an Ad-Hoc Alert", "Faculty Optional Tool – Creating an Appointment Campaign", "Faculty Optional Tool – Recording Attendance", "Faculty Optional Tool – Creating & Using Student Lists", "Scheduling, Editing, & Canceling Appointments", "Summary Report Guidelines", "Navigate Student Contact Policy", and "Alert Descriptions". On the right side, there are two promotional banners: "NAVIGATE Comms Calendar" and "ALERTS: NEXT STEPS".

For Professional Advisers, Faculty Advisers, & Care Units - Navigate | UWSP

# FERPA

*I can't use Navigate because of FERPA.*

# Family Educational Rights and Privacy Act (1974)

## Students are given 3 primary rights:

- Inspect and review their education records
- Have some control over the disclosure of information from their education records
- Seek to amend incorrect education records

## Education records are those records which are:

- Directly related to a student
- Maintained by the university or a party acting for the institution

NOT: sole possession notes, law enforcement records, employment records, medical records, or alumni records

# Who has access to education records?

- The individual student
- Whomever the student authorizes by providing the institution with a written release
- Any party requesting directory information (unless the student has a FERPA hold)
- "University officials" who have a "legitimate educational interest"

# UWSP Definitions

## UW-Stevens Point Official

UW-Stevens Point defines university (or school) official as any faculty, administration, staff, student employees and other persons who work with and/or manage student records information. Included in this definition are contractors, consultants, volunteers and other outside providers used by UW-Stevens Point, including the UW-Stevens Point Foundation and the National Student Clearinghouse.

## Legitimate Educational Interest

University officials must demonstrate a legitimate educational interest to gain access to student education records and may only access student education records to fulfill the responsibilities of their official role with the university. Any university official who needs information about a student while performing instructional, advisory or administrative duties for the University of Wisconsin-Stevens Point has a legitimate educational interest.

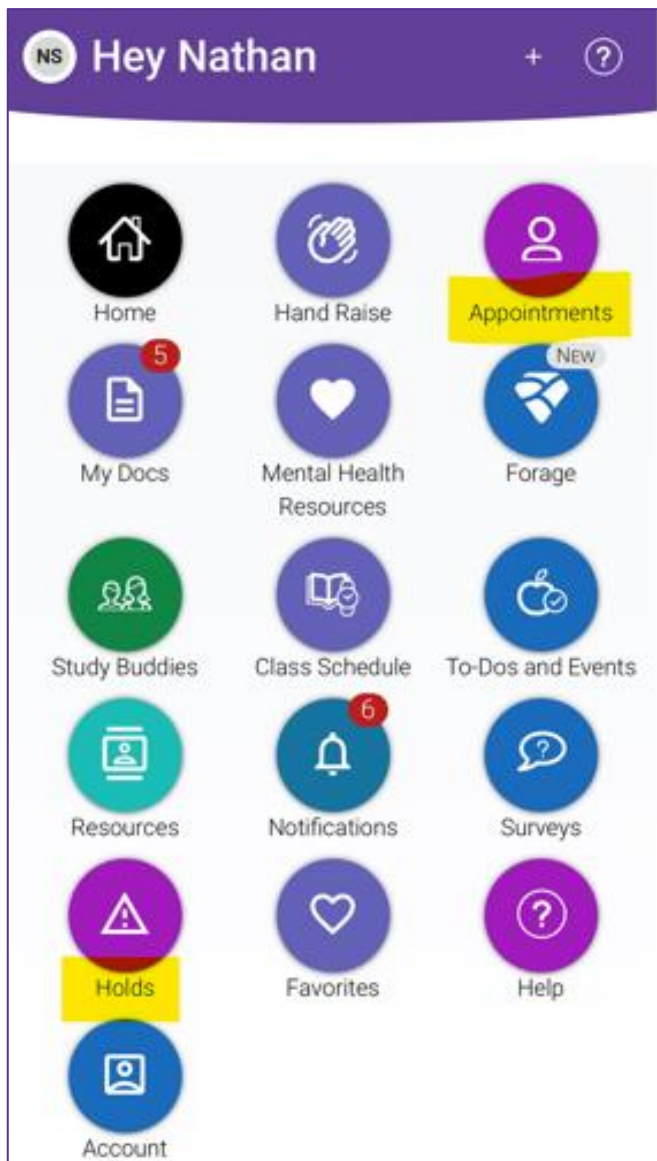
# Navigate and FERPA

Based on our institution's definition of a school official and legitimate educational interest, advisers, select administrators, and support staff (TLC, DRC, DATC, etc.) have access to Navigate education records to complete their job duties.

Any information that is added to a student account in Navigate is personally identifiable and becomes a part of their education record that students can request to see.

- Includes alerts, appointment summaries, notes, check-ins, etc.
- Keep information factual and avoid subjective judgements/opinions.

# Outreach & Care with Navigate



- View student profile
- Create lists to use for follow up
- Message students (email or text)
- Progress Report Campaigns (PRC)
- View past & create your own Appointment Summary
- Add a Note on this Student
- Issue an academic alert – Ad Hoc Reporting
- Appointments (& Campaigns)
- Messaging Campaigns
- +more

Navigate allows you and the student:  
To stay informed. Be proactive. Be data driven. Make informed decisions. +

# Student Profile view

The screenshot shows the 'Staff Home' interface in the Navigate360 system. A table titled 'My Assigned Students for' lists eight students. A yellow box highlights the first student's name, with an arrow pointing to the 'Student Name' profile page. The profile page features a top navigation bar with tabs: Overview, Success Progress, History, Courses, Path, and More. A yellow box highlights the 'History' tab, with an arrow pointing to it from the text 'Beneficial options to consider viewing'. Below the navigation bar, a summary card displays key statistics: Course Grade D/F (36), Repeated Courses (7), Withdrawn Courses (8), Missed Success Markers (0), and Cumulative GPA (1.61). Below this, an 'Overview' section lists the student's major(s): Communication (BS) and Psychology (BS). On the right side of the profile, there is a placeholder for an 'Image of student' and a list of 'Options' including 'Message Student', 'Add a Note on this Student', 'Report on Appointment', 'Create Request for Appointment', 'Schedule an Appointment', and 'Add to Student List'.

Navigate is a permission-based platform. Your screen may look different compared than other users.

# 'Report on Appointment'

UNIVERSITY OF WISCONSIN - STEVENS POINT

Navigate360 | STUDENT SUCCESS

## Student Name

Overview Success Progress History Courses Path More

|                  |                  |                   |                        |                |
|------------------|------------------|-------------------|------------------------|----------------|
| Course Grade D/F | Repeated Courses | Withdrawn Courses | Missed Success Markers | Cumulative GPA |
| 36               | 7                | 8                 | 0                      | 1.61           |

Total Credits Earned: 115.00  
Credit Completion % at this Institution: 45%  
Support Priority: Moderate [View detail](#)

Image of student

Options

- I want to...
- [Message Student](#)
- [Add a Note on this Student](#)
- [Report on Appointment](#)
- [Create Request for Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)
- [New System Capture Email](#)
- [Edit User Settings](#)
- [Upload Profile Picture](#)

Overview

Communication (BS)  
Bachelor of Science with a concentration in Professional Communication  
UW-Stevens Point

Student ID

Classification  
Senior

Other Major(s)  
Psychology (BS)  
Bachelor of Science  
UW-Stevens Point

Most Recent Enrollment  
2025 Spring

Major History

Goals & Interests (supplied by the student)

- Used when there isn't a meeting scheduled such as: student walk-in, emailed, phone calls, office hours
- creates Standard Appointment Summary which students can see

## APPOINTMENT REPORT FOR

Appointment Details

Care Unit: Advising

Location: Select Location

Service: Select Service

Course: Start typing to search all courses

Meeting Type: Select Meeting Type

Date of visit: 02/12/2025

Meeting Start Time: 11:08am to Meeting End Time

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

Attendees

Catherine Storey  
Administration, Adviser

Attended

Summary Details For

Student's Plan Next Term: Continuing, Graduating, Transferring, Withdrawing, Stopping Out or Suspended

Why student has less than 12 credits (FYS only)

• Student has been informed that UW Extended Campus classes (UWX) do not count towards the UWSP tuition plateau. Students are charged per-credit for UWX courses.  Yes  No  N/A

• Branch campus: Student has been informed that Stevens Point campus classes have a higher tuition rate than branch campus courses. Taking Stevens Point campus courses will increase the overall cost for the semester.  Yes  No  N/A

Summary

Paragraph

Attachments

Attach File

Choose File No file chosen

An appointment will be created after you submit this report. If a Meeting End Time is not entered, this will default to the time you Save this Report.

# 'Add a Note on this student'

Options

I want to...

- [Message Student](#)
- Add a Note on this Student**
- [Report on Appointment](#)
- [Create Request for Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)
- [New System Capture Email](#)
- [Edit User Settings](#)
- [Upload Profile Picture](#)
- [Impersonate User](#)

ADD A NOTE TO **Student Name**

Note (Required)

Paragraph **B** *I*

Note Subject

Image. Student Name & ID #  
Senior  
Communication (BS),  
Psychology (BS)

Relations

Note Reason

Note URL

Visibility

Catherine Storey Only ?  
 Student Name ?

Attach File  
 No file chosen

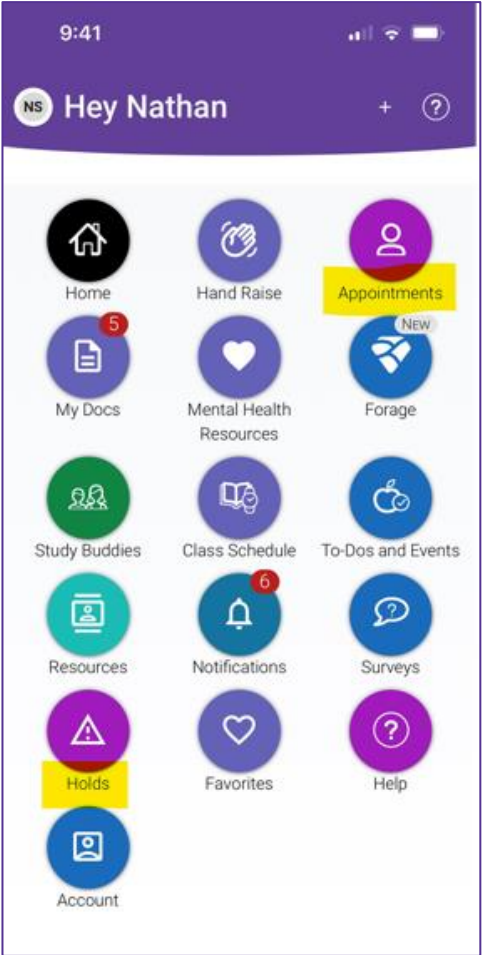
Cancel

- **'Visibility'**: notes can be seen by those with role of "view notes." Visible to all with advisor role: staff and faculty.
- Professors can also view all notes even without being an advisor
- Would be included in a Records Request
- Should I select a box?
  - Default is as shown, no boxed is checked.
  - First option:
    - shows author/your name
    - check this option to make note only viewable to self/author
    - Not checked: any viewer with the 'note view' permission can view
  - Second box: 'Student Name': selecting would allow student to view

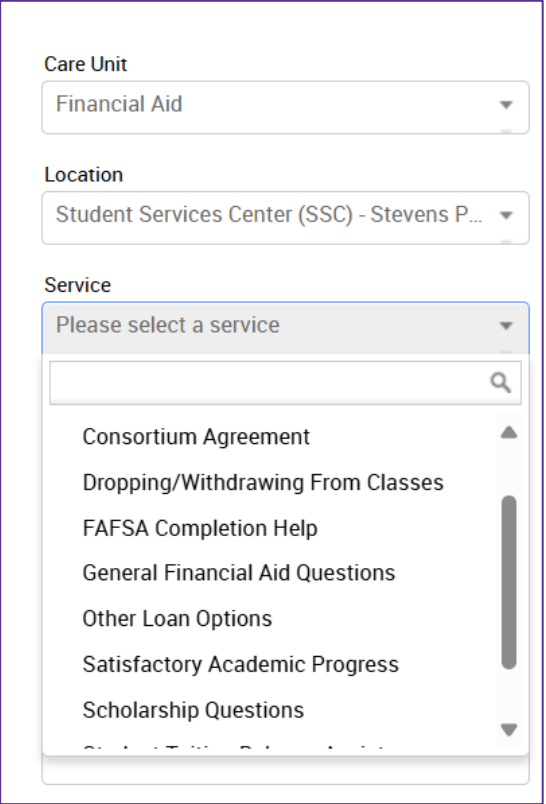
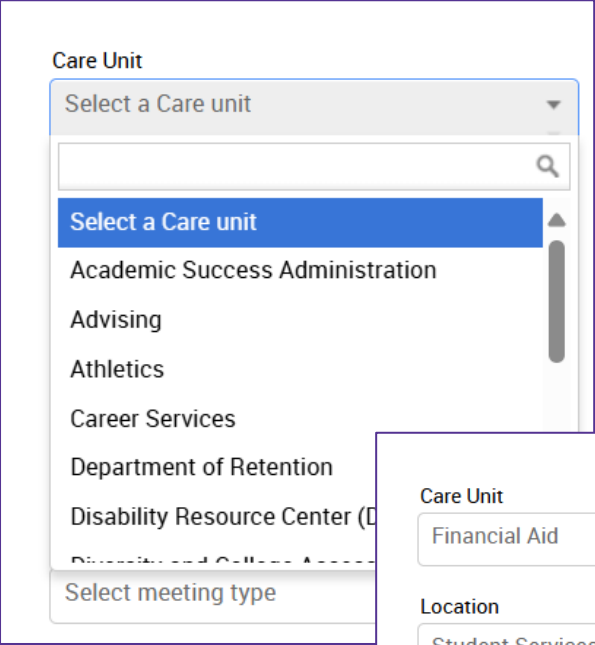
Note Reason

- FERPA Release
- General Note - Not for Appt Summaries
- Preferred Name**
- Student Pronouns
- TLC Tutor Note - Not for Appt Summaries

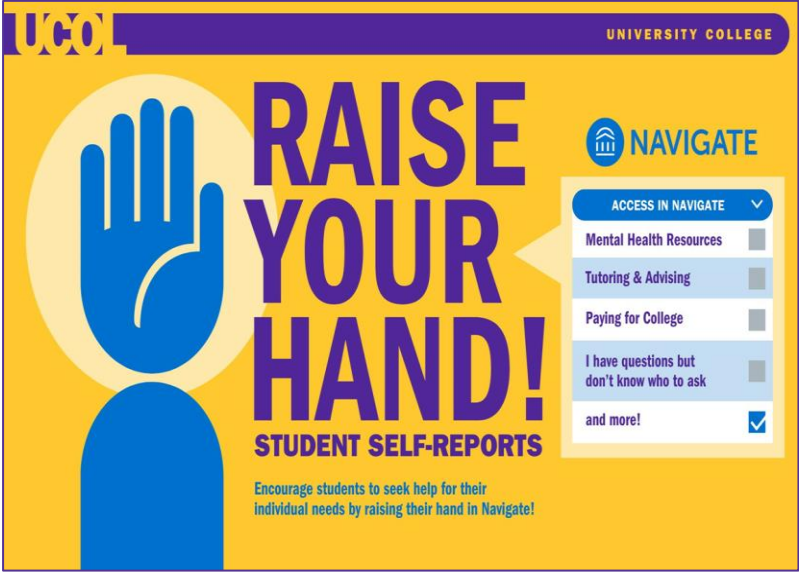
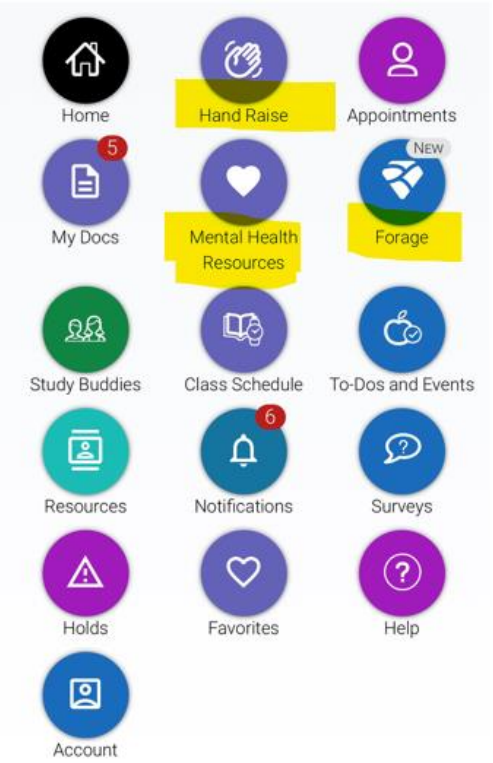
# Student outreach options:



- Make an appointment:
  - **Adviser:** *\*excludes those who do not utilize Navigate for appointments*
  - TLC
  - DRC
  - Anyone on their Success Team
  - Financial Aid
  - Housing & Residence Life
  - Office of the Registrar Graduation Auditor
  - +more
- Impacts to registration: view holds



# Resources available to students



**Hand Raise**

Submit a self alert to your school staff. They will review these and contact you to follow up. You can see your self alerts in the "My Docs" feature.

Please select a reason \*

Choose one

Is this associated with a specific class?

Optional

Additional comments \*

Please enter a comment.

Submit Cancel

**Hand Raise**

Submit a self alert to your school staff. They will review these and contact you to follow up. You can see your self alerts in the "My Docs" feature.

Please select a reason \*

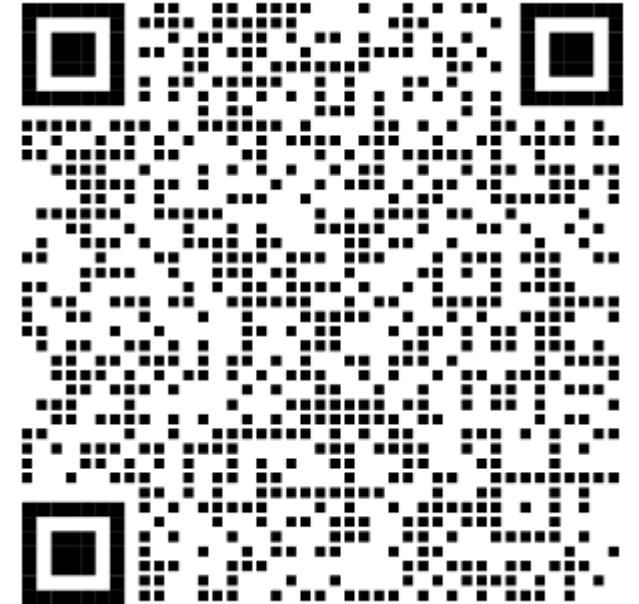
Choose one

- I have questions, but don't know who to ask.
- I need help paying for college.
- I need help with a research assignment.
- I need help with career planning.
- I need help with mental health resources.
- I need help with my academic plan, or changing majors.
- I need help with studying skills, or tutoring.

## NAVIGATE FEATURES

# Navigate Resources available to staff/faculty

| NAVIGATE FEATURE   | BENEFIT OF FEATURE  | BASIC<br>(REQUIRED) | BETTER<br>(RECOMMENDED) |
|--|---|---------------------|-------------------------|
| <b>Setup MS Outlook Calendar Sync</b> <a href="#">Click Here</a>   | Allows for easy student-driven scheduling without double booking by ensuring that students cannot schedule an appointment with you when you are busy.   | ✓                   |                         |
| <b>Set Your Availability</b> <a href="#">Click Here</a>  | Allows faculty to pre-set their availability so that students can easily see and select an available appointment slot.  | ✓                   |                         |
| <b>Report on Appointment / Create an Appointment Summary</b> <a href="#">Click Here</a>  | Allows faculty to keep a record of their meetings with students, summarizing issues discussed, goals set or accomplished, etc. When stored as appointment reports in Navigate, these records are also available for review by the student and by other faculty or staff members who support the student's success, such as advisors, tutors, or academic coaches. |                     | ✓                       |
| <b>Issue An Alert</b> <a href="#">Click Here</a>   | Allows faculty to refer students to one or more of the following supports: Advising, the Disability Resource Center (DRC), Diversity and College Access (DCA), the Tutoring-Learning Center (TLC), or Financial Aid.  |                     | ✓                       |
| <b>Record My Class Attendance</b><br>(used to record attendance quickly and easily in the courses you teach)   | Allows faculty and others who support student success, such as advisors and academic coaches, to see class-attendance patterns for those students with whom they work.  |                     | ✓                       |
| <b>Record All Class Attendance</b><br>(used to record attendance quickly and easily in a course where you presented or otherwise taught, even though you were not listed as the instructor) <a href="#">Click Here</a> |   |                     |                         |
| <b>Create a Appointment Campaign</b> <a href="#">Click Here</a>  | Allows faculty advisors to use a single, automated message inviting all advisees to schedule an advising appointment within a specified timeframe. Additionally, the appointment campaign simplifies the appointment scheduling process for students.   |                     | ✓                       |



## HELP IS AVAILABLE

# Questions?



UWSP



University College  
University of Wisconsin-Stevens Point