

## SDSU NAVIGATE TRAINING MANUAL

### ROLE: FACULTY

Support Area	Functions & Processes
<b>Student Information</b>	<ul style="list-style-type: none"> <li>• Easy access to expanded student information not available in other systems..</li> <li>• View “categories” that identify student affiliations (e.g., commuter, EOP, Compact for Success, International)</li> <li>• View “Tags” that provide important notes on student events (e.g. Leave of Absence).</li> <li>• View administrative notes about your students (e.g. serious health issues, death).</li> <li>• View “alerts” (referrals) for students (e.g. considering leave, referred to ECRT).</li> <li>• Student contact information.</li> </ul>
<b>Teaching &amp; Outreach</b>  <small>NOTE: All communication sent through SDSU Navigate appears automatically in the sdsu.edu email account. Even though email exchanges occur in gmail, a record is preserved in SDSU Navigate.</small>	<ul style="list-style-type: none"> <li>• Create lists of students (each course, master list for all courses).</li> <li>• Text, email or call students easily.</li> <li>• Email or text all students in every course and/or section at once.</li> <li>• Copy advisers, professors, student assistants, etc. on important communications.</li> <li>• Record of “conversations”</li> <li>• Add a report on Office Hours /advising (optional).</li> <li>• Add reminders to a student profile (that only you can see), which can alert you when it is time to follow-up with a student.</li> <li>• See all your reminders for all students in all courses in one place.</li> </ul>
<b>Intervention &amp; Referrals</b>	<ul style="list-style-type: none"> <li>• Issue alerts for students to refer them to support services (e.g. tutoring, ECRT).</li> <li>• Respond to requests to complete progress reports as part of a Progress Report Campaign launched by advising staff.</li> <li>• Create Ad-Hoc Progress Reports for students in your courses.</li> </ul>

**NOTE:** Faculty members have this level of access as a default. They do not need to complete an EAB User Agreement form, unless they need Advisor level access or above, which would provide student performance data such as GPA, progress toward degree completion, etc. [If you are a faculty member with a formal advising role, see your college’s Assistant Dean or Advising Center Director for details on obtaining additional access and training.](#)

## GET STARTED

### Logging On

1. Go to [sdsu.campus.eab.com](https://sdsu.campus.eab.com)
2. Use your SDSU SSO (Single Sign On) credentials to login.

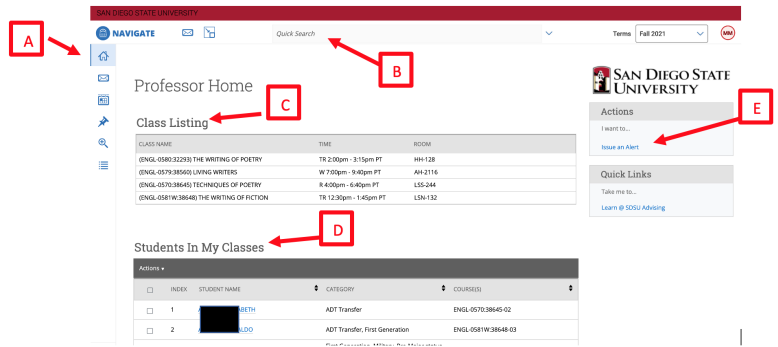
### Training & Getting Help

- Visit the SDSU Navigate Website: <https://studentsuccess.sdsu.edu/navigate-sdsu>
- Self-enroll in the CANVAS Faculty/Staff Advising Homeroom: <https://sdsu.instructure.com/enroll/EMHDDP>
- Reach out to your college’s Assistant Dean for Student Success.
- Submit an SDSU Navigate Help Ticket: <https://tinyurl.com/SDSUNavigateHELP>

## Your Home Screen

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

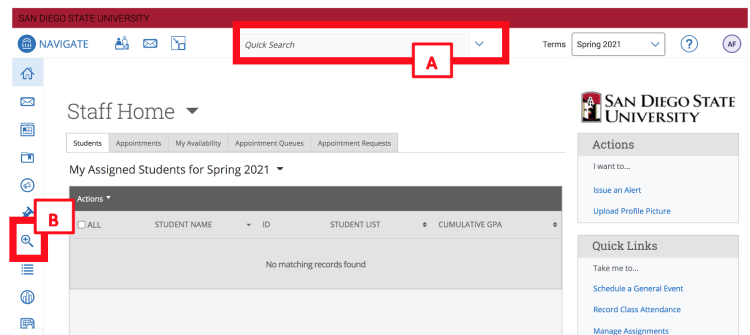
- Left Hand Navigation Bar/Menu:** vertical icons that border the left side of the screen. Use these to navigate between the different functions available in SDSU Navigate.
  - House = Home Screen
  - Envelope = Conversions
  - Calendar = Calendar
  - Push pin = Reminders
  - Looking glass = Advanced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



## LOOK UP STUDENT INFORMATION

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

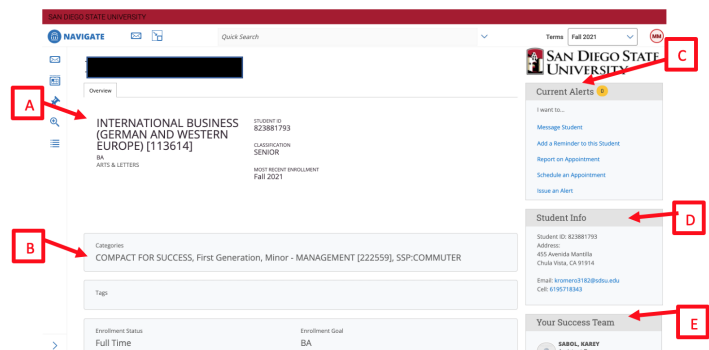
- Quick Search:** Click in the quick search field in the upper center of your screen, use the student's RedID, email, phone number or name. Once a pop up list appears, choose the correct student from the option. This function is most useful when looking up information for a single student.
- Advanced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



## Student Profile

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

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

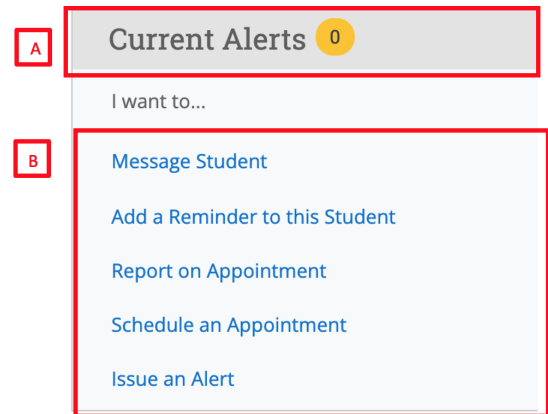


here. Finally, you'll see whether they are full or part time and what their degree objective is.

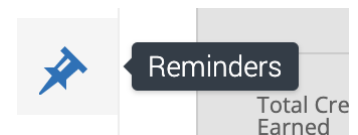
- C. **Actions Menu:** View any alerts on your students, and take action for the student. You can message a student (email or text), add a reminder to a student profile, you can report on an advising session or conversation you had with a student (optional), schedule an appointment, or issue an alert.
- D. **Student Info:** view the student's contact information.
- E. **Your Success Team:** see who the students assigned advisors and other instructors are.

## Take Action from the Student Profile Screen

- A. **Staff Alerts\*:** identifies if any "Alerts" have been placed on the student. For example, if the student is considering a Leave of Absence, a "Leave of Absence / Departure alert" may be placed on the student. Alerts may open "Cases" which are managed by the assigned staff member.
- B. **Action Links:** use links to take action with or for the student.
  - **Message student:** message the student (email and/or text). Please adhere to the [SDSU Navigate Communication Standards](#).
  - **Add a reminder:** add a follow-up note (to yourself) to follow up.
  - **Report on Appointment\*\*:** add an advising report to the student's record.
  - **Schedule an Appt.:** schedule a future appointment for the student with anyone on campus. Note: only those trained to do this as part of their role should schedule appointments for other users.
  - **Issue an Alert:** click here to add an alert on the student.



## Set Reminders for a Student



Reminders are created by staff members in order to prompt a future action regarding a particular student. This can be useful to track next steps for the staff member, to follow up on pertinent information shared during an appointment, or to reconnect with a student at a more appropriate time. For example, you may be working with a student who is having difficulty in a specific course - add a reminder to check-in on the student's progress after the upcoming midterm exams. Alternatively, the student may be exploring summer internship opportunities - add a reminder to touch base in a few weeks and find out where they applied. Staff can quickly add a reminder via the "Add a Reminder to this Student" link on the Student Profile Action Menu (described above).

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

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

### My Reminders

Upcoming And Overdue Reminders

Actions	REMINDER	STUDENT	DATE	ACTIONS
<input type="checkbox"/>	Check in on her writing center appointment,	<a href="#">GABRIELA RIOS</a>	11/30/2021	<a href="#">Edit</a>
<input type="checkbox"/>	Ask about his internship application.	<a href="#">GENER ABDON</a>	12/15/2021	<a href="#">Edit</a>

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

## ISSUE ALERTS

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

Alert Name	Type/Purpose
Academic Support Referral	A student needs academic support for a course or subject area, or needs support with conducting research, etc. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email message about how to access a variety of academic support services at SDSU.
At-Risk to Fail	Instructors check this box as part of a Progress Report, or in an ad-hoc fashion, when a student is at-risk to fail the course. Alert issuer should identify the course and include as much detail as possible about why the student is at-risk to fail the course. For example, it may be due to missing assignments, frequent absences, inconsistent academic performance, other reasons, or a combination of reasons. Email message sent to the students alerting them that they are at-risk to fail a course, with instructions about next steps they need to take.
Economic Stress / Basic Needs Insecurities (Non-immediate)*	A student has an economic crisis or trouble meeting basic needs; IS NOT URGENT, but could benefit from the support of ECRT. Please do not add any specific details into the "Additional Comments" box when issuing the alert. For a general referral (non-crisis), the student will receive an automated email with information about how to connect with ECRT.
Economic Stress / Basic Needs Insecurities (Immediate)*	A student has an immediate economic crisis that IS URGENT in nature and/or cannot meet immediate basic needs. Please do not add any specific details into the "Additional Comments" box when issuing the alert. For an urgent/crisis situation pertaining to the student's basic needs, the student will receive an automated email with information about how to access ECRT, assigned ECRT staff will receive the case.
Financial Aid Referral	A student needs financial aid counseling and/or assistance (non-crisis). Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email with information about how to contact the Student Financial Center (virtual help desk).
Leave of Absence / Departure Referral	A student mentions or indicates they may want to leave SDSU, either temporarily or permanently. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email about how to explore leave of absence as an option, and who to follow up with if they intend to go on leave, or if they intend to permanently end their studies at SDSU.
Health / Wellness Referral*	A student is in need of mental health intervention or wellness check. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an automated email with information about how to access mental health resources.
Non Responsive Student*	A student has stopped coming to class, has stopped completing coursework, or has stopped interacting with faculty/staff in general. Alert issuer should describe their relationship to the student (instructor, advisor, etc.) include as much detail as possible describing the attempts to contact the student, related courses/programs, and if possible, the last time they made contact with the student. A case will be opened and assigned to the Assistant Dean of Student Success (FASS).
Serious Injury / Medical Emergency*	A student reports having experienced a serious injury or medical emergency. Please do not add any specific details into the "Additional Comments" box when issuing the alert.
Student Grievance Referral	A student has a specific complaint or grievance about the university and/or its staff, faculty or administrators. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student will receive an email referring them to the Office of the Ombudsman and the grievance procedures listed on that website.
Technology Assistance	Student is experiencing specific issues with access to or use of technology. Please do not add any specific details into the "Additional Comments" box when issuing the alert. The student receives an automated email with information about how to get support with obtaining and utilizing technology resources.

\*Alerts with asterisks mean a case will be opened and managed by an advisor or qualified staff member. If there is no asterisk, it means that the student will receive an email that outlines how to get the support they need.

## From the Staff or Professor “Home” screens

**Step 1:** Select “Issue an Alert” from the “Action” menu.

**Step 2:** Search for the student for which you want to issue the alert.

**Step 3:** If the alert is related to one of the student’s courses, select that course from the drop down list.

**Step 4:** Add any comments.

**Step 5:** Click Save.

The screenshot shows the 'ISSUE AN ALERT' form. Callout 1 points to the 'Student' search field. Callout 2 points to the 'Please select the reason you believe this student needs assistance' dropdown menu. Callout 3 points to the 'Is this alert associated with a specific class?' dropdown menu. Callout 4 points to the 'Additional Comments' text area. Callout 5 points to the 'Submit' button.

## On the Student Profile

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

The screenshot shows a student profile for Abigail Castro. The 'Current Alerts' pane on the right side of the profile has the 'Issue an Alert' button highlighted with a red arrow.

## When Completing a Progress Report

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

for

## COMMUNICATE WITH STUDENTS

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

**NOTE:** Please see the SDSU Navigate Guide “FERPA: Privacy Dos and Don’ts” (Canvas Advising Homeroom), review the [FERPA Guidelines](#) from Enrollment Services, and the SDSU Navigate website (which houses the [SDSU Navigate Communication Standards](#)).

## Send Messages

You can send emails or texts to one or more students from Staff Home, the student profile, or Advanced Search. Most Action menus throughout the platform also allow for sending emails or texts. You can send both text and email messages to either a **single student** (from a student’s profile, select “Message Student”) or to a **group of students** (from either a search result or a list). When the messaging management box pop up, please keep in mind:

- Use the “tabs” to toggle between “Send Email” or “Send Text,” and choose the type of message you want to send.
- After filling out the message content, if you want to “cc” another person in the message, you can add their email addresses to this field.

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

The screenshot shows the 'Staff Alerts' pop-up menu. The 'Message Student' option is highlighted with a red box.

The screenshot shows the 'SEND A MESSAGE TO ABIGAIL CASTRO' form. Callout A points to the 'Send Email' tab. Callout B points to the 'Send Additional E-mail Notifications To:' field.

## PROGRESS REPORTS

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

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

### Issue an Ad-Hoc Progress Report

When you have a concern about a student's academic progress, consider discussing the concern with the student as a first step. Students early in the semester may not yet have a sense of their own progress, or they may know they are struggling but do not know how to get help. Often hearing from their instructor that they are at-risk will be just the signal they need to get back on track.

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

#### Class Listing

CLASS NAME	TIME	ROOM	
(BIOL-1344) Human Anatomy and Physiology 2	TR 8:30a-10:00a	Science and Research 1-117	<a href="#">Progress Reports</a>
(BIOL-3324) Human Physiology	TR 11:30a-1:00p	Sci. & Engr. Classroom Building-104	<a href="#">Progress Reports</a>
(BIOL-4103) Integration of Biological Knowledge	M 9:00a-10:00a	Susanna Garrison Gymnasium-201	<a href="#">Progress Reports</a>
(BIOL-4103) Integration of Biological Knowledge	W 9:00a-10:00a	Susanna Garrison Gymnasium-201	<a href="#">Progress Reports</a>

To issue an Ad-Hoc Progress Report:

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

Use The Checkboxes To Select Students From Your Classes And Then Click The "Create A New Progress Report" Button To Begin Adding A New Progress Report.

Actions	PHONE NUMBER	EMAIL ADDRESS
<input type="checkbox"/>	Angell, Eric	ksmith@eab.com
<input type="checkbox"/>	Biggs, Shannon	ksmith@eab.com
<input type="checkbox"/>	Kelley, Chris	kirsten.alysa.smith@gmail.com
<input type="checkbox"/>	Mopar, Roy	

The progress report dialogue box will appear:

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

#### ADD A NEW PROGRESS REPORT

Any concerns about this student?  Yes  No

What concerns do you have? (Choose at-least one, and as many as needed).

How Many Absences?

Current Grade?

Comments

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



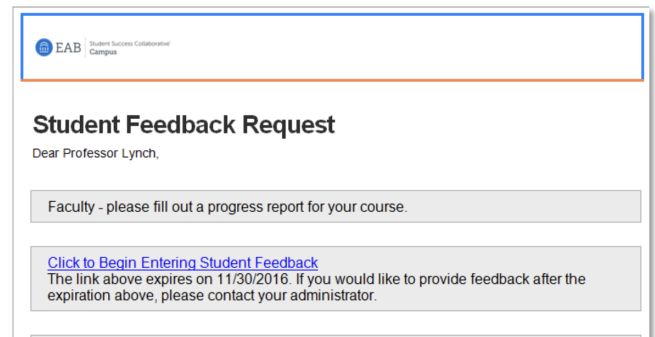
## Respond to a Progress Report Campaign

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

You are able to provide all feedback by clicking on the link within the email with no need to log in to SDSU Navigate. A web page will display the courses you teach and the class roster for those courses. Note that the students displayed may not be all of the students in that class as Progress Report Campaigns typically target specific populations of students, though sometimes they can target entire courses. The emailed progress report format looks a little different from completing an Ad Hoc Progress Report, however the information options are identical, including Alert Reasons, absences, grades, and an open-text box to share any additional context.

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

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



Professor Home

SDSU San Diego State University

NARELLE, please respond to the following progress report request(s).

DANIEL OLIVEIRA would like you to complete 11 progress report(s) by **Sunday, April 17, 2022**. [Fill Out Progress Report](#)

### Student Feedback

Your information is secure. Please do not disclose your school to anyone outside of SDSU and regulators concerning FERPA and social security numbers.

**Professor Lynch:**  
You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

ACCT 225-6 INTRO TO FINANCIAL ACCT

Student Name	At Risk in Fall Your Class?	Alert Reasons (You must choose at least one if the student is at risk)	Absences	Grade	Comments
Angel, Eric Student ID: 184223	Yes	Alert Reasons			
Big, Shannon Student ID: 184852	No	Alert Reasons			
Kelley, Chris Student ID: 183221	Yes	Alert Reasons			
Megan, Kay Student ID: 183247	Yes	Alert Reasons			

[Submit only marked students \(but I'm not done\)](#)

This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

[Submit unmarked students as not at-risk \(I'm all done\)](#)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.

## What Happens After You Submit a Progress Report?

When you submit a progress report:

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

*An instructor has concerns about your absences from class and/or your academic performance, and these behaviors put you "at-risk" for successfully completing the course. All students face challenges at some point in their courses, and those that overcome these challenges typically take advantage of the many resources available at SDSU. Here are the expected next steps for you to take:*

1. *Make time to meet with your instructor as soon as possible (e.g. during office hours) to develop a plan on how you can change course in the class.*
2. *Utilize campus resources for support: [Library Hub](#) | [Campus Support Resources](#)*
3. *Reach out to your advisor as follows ([for Athletes and EOP students, this step is mandatory](#)):*
  - **Athletes:** *make an appointment with your Athletics Advisor to discuss options for tutoring and other types of support.*
  - **EOP Students:** *make an appointment with your EOP Counselor to discuss options for tutoring and other types of support.*

*If you are NOT an Athlete or EOP student, please reach out to an assigned advisor in the following order of preference:*

- **Coordinated Care Advisor (CCA):** *If you have an assigned CCA, schedule an appointment with them. If not, see your major advisor.*
- **Major Advisor:** *If you do not have an assigned CCA, schedule an appointment with your assigned major advisor.*

To make the appointment in SDSU Navigate:

1. Log into SDSU Navigate using your SDSU email ID: [sdsu.campus.eab.com](mailto:sdsu.campus.eab.com)
2. From your student home screen, click on the blue "Get Assistance" button.
3. On the right side of the scheduling screen, choose "Meet With Your Success Team."
4. From the list of advisors, please select the appropriate advisor as described above.
5. Make an appointment for a day/time that works for you.

We are here for you and invested in your success!

SDSU Navigate | Campus Advising Team