Navigate User Guide

UNIVERSITY OF WYOMING

Student Success
and Graduation

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FERPA and Confidentiality

FERPA- What is it?

From the University of Wyoming website: "FERPA is the Family Educational Rights and Privacy Act of 1974. The essence of FERPA is to give a student the right to inspect his or her education records and to protect the privacy of these records. The statute applies to any educational agency or institution that receives funding under any program administered by the Secretary of Education."

For more information about specific student rights under FERPA, visit these websites:
[University of Wyoming](#)
[U.S. Department of Education](#)

Confidentiality

Navigate is a useful tool for peer mentors to access the academic records of students so that we can provide better assistance to them. This is privileged information protected by FERPA, and therefore should be treated as such. Student records should be used in a work context as a peer mentor at all times. This information should not be used outside of a mentorship purpose or at that student's request. A student's records can be discussed with that student and those in direct leadership roles above you (cohort leader, program director, Dean of Student Success and Graduation) but no one else. Information found in these records should never be shared with a student's friends, roommates, or even parents, as this is in violation of FERPA and a student's privacy. Peer mentors who violate this law can face legal ramifications, so do not abuse this privilege.

How else does FERPA apply to this role?

Notes you make through a meeting summary in a student's profile are part of their academic record. Through FERPA, each student has the right to review educational records pertaining to them, as permitted by the policy. Therefore, it is important that these summaries are true, accurate, and professional (see below section for appointment report guidelines). A student is able to request and view these appointment summary notes at any time.

My Availability

Within Navigate, you will set up availability to allow students to meet with you on drop-in advising. Setting up your availability is a starting place, but you can also always edit your availability at any time.

Setting Availability

From the Staff Home page, select the 'My Availability' tab.

Step 1: Click the Add Time button in the Actions Menu (see image. This button will open a pop-up to set availability, as demonstrated below).

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select Drop-Ins for office hours and appointments for other times.

Step 4: Select a duration for this availability, use current term if you have a changing schedule each semester.

Step 5: Check off "Add this availability to your personal availability link?". This link can then be used in an email signature for students to set up personal meetings through Navigate.
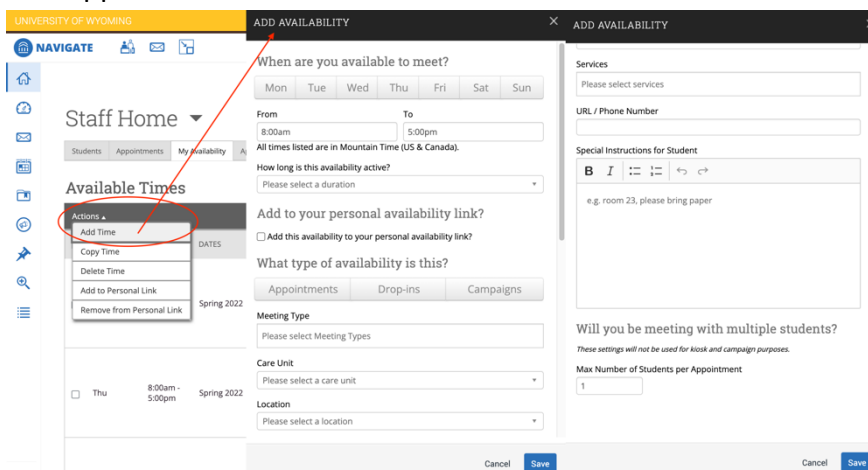
Step 6: Select meeting types for how you would like to meet with students (in-person, virtual, phone).

Step 7: Select care unit. The role assigned to your account will appear in the drop-down menu and select this. Example- Cowboy Coach appears in the drop down for student hired as a peer mentor and assigned this role.

Step 8: Choose the location where you will be available.

Step 9: Select student services – relevant services will appear in a drop-down menu for your assigned role.

Step 10: Optional: URL/Phone Number- include link to personal meeting room if offering virtual option for meetings.

Step 11: Leave max number of students at default 1 setting.

Last step: Click the Save button.

Note: Repeat this process until all of your availabilities have been defined. You can have as many availabilities as needed.

There are two other options in the Action menu under Times Available.

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied, and a dialog will open allowing you to make edits or to save your newly created availability.

Delete Time- to delete your time, simply select the time and click the Delete Time button. Note: Inactive availabilities are highlighted in red in the Times Available grid.

Students

Within Navigate, you will add students to your list so that you can message entire student list at once and access their profiles from one central location. Multiple lists can be created to sort students by specific attributes.

Adding Students to Lists

From the Staff Home page, select the "Students" tab at the top. This page allows you to see all students assigned to you. From the "List Type" drop-down menu, you can select a specific list that you created, which allows you to see the names of all students you sorted into that list. For example, all assigned students can go on one general list, while other sub-lists can be created for students on academic probation, sorted by grade level, or sorted by major, etc. Students can appear on more than one list.

To add students to a list(s):

Step 1: Search a student's name or W# in the Quick Search bar at the top of the page.

Step 2: When student name appears in the search results, select their name to view their academic profile.

Step 3: On the right sidebar of the student's profile, under the staff alerts heading, select "Add to student list"

Step 4: A pop-up window will appear on the page. If you have created lists previously, they will be listed here. Check off the desired list(s) to add student to and click "save".

Step 5: If no lists have been created previously, click on "Create new list…". A box will appear above where you will type in the title for this list). This new list will automatically be checked off to add the student to. Repeat as necessary if wanting to create multiple lists. Click "save" once finished.

Step 6: Repeat above steps until all mentees have been added to desired lists.
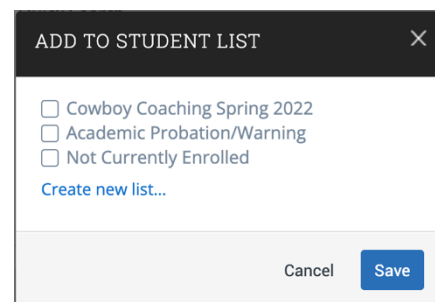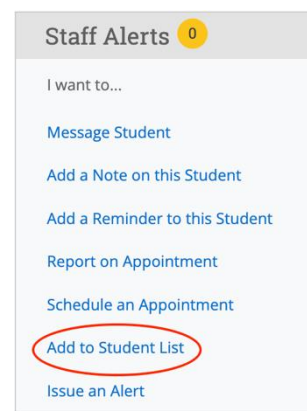
Note: If you would like to update the name of a list, use the left sidebar on the Staff Home page to select the "Lists and Saved Items" option. Select the list that you would like to edit. Once on the page for that list, select the pencil icon next to the list title to edit the text.

Sending Messages

Within Navigate, you can send messages to individual students or multiple recipients. These messages can be viewed by students through the Navigate app and in their E-mail inbox. Messages sent in Navigate can be viewed through the "Conversations" tab at any time.

Messaging List of Students

From the Staff Home page, select the "Students" tab at the top. This page allows you to see all student lists you have created.
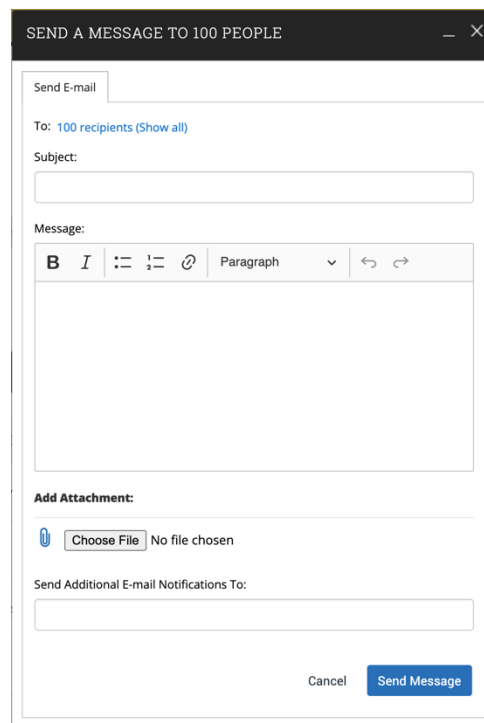
Step 1: To message an entire list of students, select desired list from "List Type" drop-down menu.

Step 2: Select the check box next to "All" in the table row above the first student's name. This will select all students on the first page, and only 100 names are visible on each page. If this list contains more than 100 students, you must select the blue highlighted text that says "Select all (number of students in this list) items." in the line above where you checked off "All". This will select the entire list.

Step 3: From the "Actions" drop-down menu, select "Send Message". A pop-up window (shown) will appear on the screen.

Step 4: Enter a subject line and compose the message in the box below. Optional- add an attachment if desired.

Step 5: Optional- In the "Send Additional E-mail Notifications To:" box, enter your personal E-mail if desired to keep a copy of this message outside of Navigate. Enter any other E-mail address that you would like to be CC'd on this message.

Messaging Individual Student

You can message an individual student on Navigate through a list or through their academic profile page.

Through student's academic profile (easiest method):
Step 1: Use Quick Search bar at the top of the staff home page to find student using their name or W#.

Step 2: Select student's name from search results to access their academic profile. On the right sidebar, select "Message student". This will open a pop-up window to send a message, as shown above. Use steps 3-5 in the "Messaging List of Students" section to send message.

Through a student list:
Step 1: Go to "Students" page from the Staff Home page.

Step 2: Using the "List Type" drop-down menu, select the desired list that contains the name of the individual student you would like to message.

Step 3: Scroll through list and check box next to student's name.

Step 4: Use steps 3-5 in the "Messaging List of Students" section to send individual message.
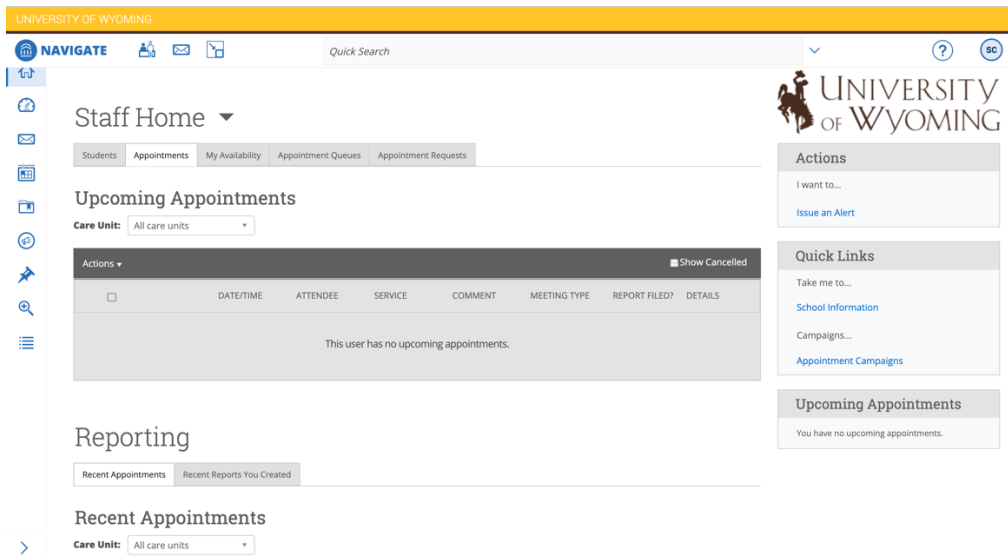
Appointments

From the Appointments tab at the top of the Staff Home page, you will be able to view all upcoming and past appointments scheduled with you.

Upcoming Appointments

The Upcoming Appointments section will list future appointments scheduled with you. This table will list the date, time, attendee, service, and meeting type for the appointment that the student scheduled.

Reporting

This section lists recent appointments made with you. From this table you can view details of the meeting including the time, date, attendee, any specific courses that were discussed, length of meeting, and a report on the meeting. To access the meeting report, select the "Report Details" option for the meeting in question. This will open a pop-up that displays the Appointment Report you created at the end of the meeting. In this section you can also view "Recent Reports You Created", which will list the date, student, summary, and follow-up status from the meeting. The report details can be accessed from this page as well.

Appointment Queues

Appointment Queues tab allows peer mentors to monitor the drop-in queue.

Students Checked In For Appointments

This table will display students who have scheduled an appointment and checked in for said appointment.

Students Checked In For Drop-Ins With Me

This table displays students who are waiting to see you, or the first available advisor. This queue only shows students that have dropped in to meet with an advisor. Students that show in this queue do not have a previously scheduled appointment. The list is sorted by placing the student who checked in first at the top.

Starting an Appointment Session

To start an appointment session for students in above tables:

Step 1: Check off student name that you are beginning a meeting with.

Step 2: From the "Actions" menu select "Start appointment". The student's name will move to the In-Progress Visits table and an appointment summary will appear.

Step 3: In the In-Progress Visits table, check off the student's name again and select "Check out" from actions menu. Fill out the Appointment Report at the end of the meeting.

Step 4: Use the steps in the "Advisor Reports" section for a walkthrough on creating the Appointment Report.
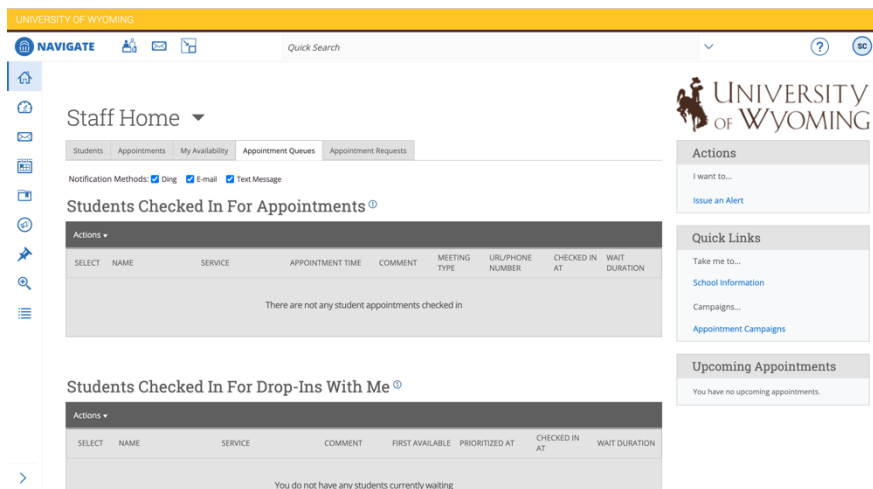
Advisor Reports

The "Create an Appointment Report" dialogue box opens automatically when you start an appointment with a student.

Create an Appointment Report

Care Unit- Select the role you met with this student in, in this example a Cowboy Coach.

Location- Select your location.

Service- Select the reason you met with a student.

Course- If a specific course of the student's was discussed you may select it.

Date of visit- Will auto populate.

Service- Select service you assisted student with during meeting.

Meeting type- Select if the meeting was in-person, virtual, or over the phone.

Your Name- Will automatically appear and be checked.

Other Attendee's Names- Any person listed on the appointment, other than the advisor, will appear.

Start Time- Will record time you open the appointment report.

End Time- Will record the time you hit save the report.

Topics Discussed- Use general terms or key words.

Referrals- Optional, include names of people or services/departments if student is referred to outside resources (example- tutoring, disability services, etc.).

Recommendations- Optional, include any recommendations made to student during meeting

Goals for next session- Optional, set goals to discuss next meeting based on conversation during this meeting.

Summary- Write the notes of your appointment. Use the "Professional Notetaking" guide on the Cowboy Coaching Teams page to write professional, clear, and concise notes.

Attach File- Optional. This may be used if you review a student's resume and suggest edits, for example. Leave blank if nonapplicable.

Save this Report- Review all information above and hit this button to enter your Appointment Report.

Create an Appointment Report When No Meeting was Scheduled

You can create an appointment report for meetings or other encounters with mentees that were not scheduled previously through Navigate.

Step 1: From the Staff Home page, use the Quick Search bar to search for the student's name that you met with. When their name appears in the search results, select their name.

Step 2: When in the student's academic profile, select "Report on Appointment" on the right sidebar.

Step 3: An appointment report pop-up will appear. Follow steps in the "Create an Appointment Report" section to create and submit a report.

Student Profiles

The student profile page provides the academic record of students including their grade history, current class enrollment, and major history. This can be found by searching a student's name and selecting them from the search results.

Overview

The overview page provides a quick glance at a student's academic history. On this page an advisor can find a student's:

GPA- Must maintain above a 2.000, otherwise will be placed on academic probation.

Repeated/Withdrawn Courses- Displays classes student has repeated or withdrawn from.

Total credits earned- Credits attempted and earned.

Credits completion % at this institution- The percentage of credits earned out of attempted credits. Must be greater than or equal to 67%. Failed, withdrawn, unsatisfactory, or incomplete credits are considered attempted but not earned.

Major- Lists current major and, if relevant, major history and terms each major was declared.

Classification- Class level at University of Wyoming.

Academic standing- Current academic status (good standing, academic probation, or academic suspension). See this link for more information.

SAP- Report of academic progress that determines eligibility for financial aid. These statuses include good standing, warning, probation, and not eligible. More information can be found here.

Courses

The courses page provides information on courses a student is currently enrolled in, as well as past course history including final grades. The current enrollments can be found at the top of the page with the ability to contact a professor if necessary. Past course history can be found in the Term Details section, where final grades are listed next to each course. The credit total for each term is listed, as well as percent completion, term GPA, and cumulative GPA.

Other Functions

Using the more drop-down menu, an advisor or mentor can view any upcoming appointments that a student has made under the Appointments tab. Under the Calendar selection, an advisor can view a student's calendar with their course schedule, which may be useful to schedule appointment times.

Other Functionalities

Dashboard
On the My Dashboard, an advisor can view useful charts for which data is being collected. The My Students widget displays a pie chart showing how many students have met with you 1 or more times compared to how many students have not met with you.
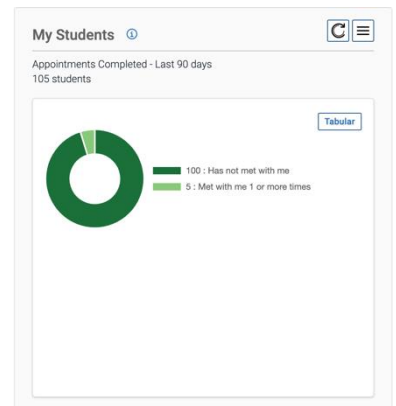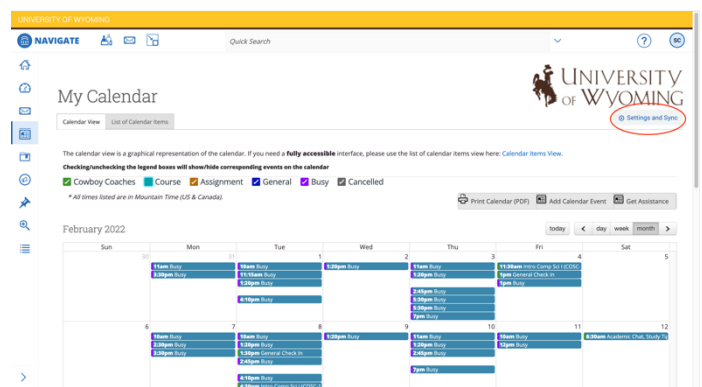

My Calendar
Appointments with students will appear on this calendar. Your calendar can be integrated with other calendar applications. This will mark times you are busy on Navigate if you create an event on the integrated calendar and will schedule appointments made with you on Navigate automatically on your other calendar. This can be done through the following steps:

Step 1: Select the Calendar option from the left sidebar of the Staff Home page.

Step 2: Under the university header, select the "Settings and Sync" button (circled in image).

Step 3: Select the "Setup Sync…" option. Then select the Microsoft Office 365 account option.

Step 4: Sign into your University of Wyoming Microsoft account.

Step 5: Your Navigate and Microsoft calendars will now be synced.

Conversations
From the Conversations tab on the left sidebar of the Staff Home, you can view your Navigate inbox. You can view your message history and search for messages from a specific person to locate certain messages more easily. This is a central location to keep track of all communications through Navigate.