Log in through GoldLink or at <https://etsu.campus.eab.com/>; use your ETSU user name and password.

**For best results open Navigate in Chrome, Safari, or Firefox.**

**Managing Re-Enrollment Outreach in Navigate**

By uploading a non-returning list and recording contacts with students, you and others can see which students have been reached, what’s been learned about them, and which still haven't registered.

# Upload a list of students

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| You can import any list of students you wish, so long as it includes E-numbers. NOTE: Navigate is only for undergraduate students. |
| 1. Save your list as a csv file in Excel. One column must contain E-numbers; it must be wide enough to display the entire number. Make sure there aren't any blank rows in it. |
| 1. Log in to Navigate and choose the **Lists and Searches** icon from the left navigation: |
| 1. Under the **Actions** menu choose **Upload Watch List** and follow the prompts. Give the watch list a clear name, because you'll select it from a menu of all watch lists later. |

# Report on contact with a student

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| When you reach a student on a non-returning list, enter a **report on appointment**. NOTE: Don’t use “Add a Note” for this purpose. Notes are for your personal use, and students can see them, too. |
| 1. Find the student by clicking the **search icon** in the top right corner of your advising screen in Navigate, then typing the student’s E-number or last name. |
| 1. When the student’s site appears, choose **Report on Appointment** in the right-hand navigation. |
| 1. When the dialog box opens . . .    * Choose the appropriate items in the dropdown menus:   Care Unit: **Re-enrollment Support**  Location: Virtual (Zoom, telephone or email)  Service: Re-enrollment assistance  Meeting Type: [email/in person/phone/group]   * Answer the questions about the contact (e.g., “Financial needs affect student’s ability to register.” Yes/No/NA) * Type a note in the textbox and **save**. |

# See which students on a list haven’t registered for fall 2020 yet

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| Navigate data refresh daily at 3 AM, so you can see which students on the list still haven’t registered. |
| 1. Choose the **Reports** icon from the left navigation: |
| 1. Under **Student Data Reports** choose the **Student** **Info** report. |
| 1. Under the **Student Information** filter, select your watch list from the **Watch List** dropdown menu. |
| 1. Under the **Enrollment History** filter, click the **+** sign; you'll see a field called **Enrollment Terms (In none of these)**. Select Fall 2020 for that field. |
| 1. Scroll to the bottom of the page and click **Search**. |

# View reports on appointments for students

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| You can see which students on your list someone’s reached, even if they're not in your area. Also, a new feature in Navigate lets you see basic information gained from every student contact. |
| For one student: Look up the student in Navigate, then go to the **Reports/Notes** tab and scroll down to appointment summaries. |
| For all students on a list: |
| 1. Choose the **Reports** icon from the left navigation: |
| 1. Choose **Appointment/Visit Reports**, then **Appointment Summaries**. |
| 1. Use **Begin Date** and **End Date** to specify the period for which you want to see advising reports. |
| 1. Under the **Student Information** filter, select your list from the **Watch List** menu. Hit **Search**. |
| 1. When the results appear . . .    * If the report has more columns than you need, choose **Actions** and **Show/Hide Columns** to pick the ones you want.    * You can sort the results using the column headers or, for more detailed analysis, click **Actions** and **Export Results** to download the results to your computer. |