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

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.

(2) Log in to Navigate and choose the **Lists and Searches** icon from the left navigation:

(3) 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

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.

(2) When the student's site appears, choose **Report on Appointment** in the right-hand navigation.

(3) 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

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:

(2) Under **Student Data Reports** choose the **Student Info** report.

(3) Under the **Student Information** filter, select your watch list from the **Watch List** dropdown menu.

(4) 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.

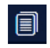
(5) Scroll to the bottom of the page and click **Search.**

View reports on appointments for students

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: 

(2) Choose **Appointment/Visit Reports**, then **Appointment Summaries**.

(3) Use **Begin Date** and **End Date** to specify the period for which you want to see advising reports.

(4) Under the **Student Information** filter, select your list from the **Watch List** menu. Hit **Search**.

(5) 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.