

Navigate360: Texting Students through the Platform Guidelines

Navigate provides text messaging functionality for faculty and staff to communicate with students, either individually or en masse.

1. Navigate Texting Functionality

- Navigate enables designated ETSU users to text students who have provided accurate cell numbers and have not opted out of ETSU texting.
 - **NOTE:** Navigate allows students to opt out of receiving of text. If a student has opted out of texts, and you send a text message, the student will receive the message as an email.
 - **NOTE:** Sometimes family phone numbers are listed under the cell phone for students. Students can change their primary phone number through Banner or when they make an appointment can correct phone number for reminders.
- Texts are delivered from the bulk number (423) 437-9797.
 - **NOTE:** If a user texts 100 or more students, the text is delivered from a no-reply.
 - **NOTE:** Students' text replies appear as emails in users' Outlook inboxes and under *Conversations* in Navigate. Users respond to replies through Outlook, but will still send as a text to the student.
- Text Message Types:
 - *Automated Appointment Notifications/Reminders*
 - When an appointment is scheduled, an automated reminder email is generated the morning of their appointment. Text message appointment confirmations and reminders are sent 1-2 hours prior to the appointment time.
 - *Campaign Messaging*
 - For *Appointment Campaigns*, students receive appointment notification/reminders through texts, the same way as they would when scheduling any appointment. For *Appointment Campaigns* and *Messaging Campaigns*, users can also elect *Text* as a messaging type when creating nudges.
 - *Ad-hoc*
 - User determined if a one-off text message is needed.
- Texts are limited to 300 characters.
- Texting will grow and change as a method of communicating. As a result, the list of prohibited practices is not exhaustive and subject to changes.

2. Best Practices for Texting Students through Navigate

- Always include an identifier, introducing who the text is from.
 - **EXAMPLE:** *Hi {student_first_name}, this is Bucky, your Academic Advisor at ETSU.*
- Be strategic about text messaging, avoid inundating students. Think about the subject of the message, and is it better served as email documentation for best record keeping?
- When asking questions in texts, steer towards Yes/No questions rather than open-ended.

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- Avoid responding quickly to texts. Students often expect quick replies. Set a reasonable response time to manage other expectations while remaining timely.
- When including *Links* in texts, the entire URL must be typed out in long format. Introduce links to help direct students appropriately.
 - **EXAMPLE:** *For help using the features in your Navigate App, visit the Navigate website for guides & tutorials under the Student tab: <https://www.etsu.edu/advisement/navigate.php>.*
 - **RECOMMENDATION:** Use Tiny URL, <https://tinyurl.com/>, to shorten the link as users are limited to 300 characters when texting.
- Content of messages should be timely and action-oriented.
 - **EFFECTIVE EXAMPLE:** *This is your ETSU Advisor. Intent to Graduate deadline is December 2. It is Nov. 21, if you have not filed yet, make sure to do so asap here: [Link to file for Graduation]!*
 - **INEFFECTIVE EXAMPLE:** *The withdrawal deadline is coming soon. Be aware if you plan on withdrawing. The instructions to withdraw is on the Registrar website.*
- Primary reasons to text students:
 - academic advisement reminders
 - enrollment reminders, including registration
 - outreach campaigns
 - appointment reminders (automated)
 - important university deadlines

3. Unauthorized Practices

- ETSU email is the only authorized electronic means for transmitting FERPA-protected educational records. Users should not include FERPA-protected records such as grades, GPAs, and Course Schedules in texts.
 - **NOTE:** Remember, texting through Navigate creates additional documentation attached to a student's institutional record. Tone and content should remain professional.
 - **RECOMMENDATION:** If FERPA protected information arises, identify the student you will be moving the conversation to email.
- Texting is not designed for prolonged back-and-forth communication.
 - **RECOMMENDATION:** If the conversation extends, identify the student you will be moving the conversation to email.
- Generally, texting should not be used as a form of initial outreach, nor the first nudge in a campaign. Texting should be used to follow up after initial conversation.
 - **EFFECTIVE EXAMPLE:** Texting a student with follow-up information after an advising appointment.
 - **INEFFECTIVE EXAMPLE:** Texting a new student to schedule an appointment.

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4. Sample Messages

Type	Examples	Effectiveness
FERPA & HIPAA	<p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. I'm checking in with you about a to-do item.</i></p>	Effective
	<p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. Please check your ETSU email for an urgent message regarding registration.</i></p>	Effective
	<p>✗ <i>I see you're failing all your classes, if you'd like to meet about making a success plan, please make an appointment.</i></p>	Unauthorized
Details about sensitive or personal information (health, disability, etc.)	<p>✗ <i>Hi [student], have you visited the Dean of Students office yet?</i></p>	Unauthorized
	<p>✗ <i>Hi [student], contact the Counseling Center [here] to discuss your anxiety.</i></p>	Unauthorized
	<p>✗ <i>Remember to go to Disability Services to get your accommodations.</i></p>	Unauthorized
Details about other personal or sensitive concerns the students has (legal, relationship, family)	<p>✗ <i>Hi [student], how are you holding up through your parents' divorce?</i></p>	Unauthorized
	<p>✗ <i>Hi [student], I hope you have a week filled with good vibes during your grandmother's cancer treatment.</i></p>	Unauthorized
	<p>✗ <i>Did you email your professors about missing class because of your Court date?</i></p>	Unauthorized
Follow-up with a student who is unresponsive to previous outreach	<p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. Scheduling for an [Campaign Service] appointment for [Location] is almost over. Can I help you make an appointment?</i></p>	Effective
	<p>✓ <i>This is [Advisor name], your [type of] ETSU Advisor. The registration deadline is approaching, ending on [date and time]. Do you need help making an appointment?</i></p>	Effective
	<p>✗ <i>You haven't made an appointment yet through the campaign invitation I sent. Time is running out.</i></p>	Unauthorized

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<p>Follow-up with a student who has not responded to initial outreach for Navigate Referrals/Cases</p>	<p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. I'm reaching out to see how classes are going. Can we schedule an appointment?</i></p>	<p>Effective</p>
<p>Follow-up with a student whom you've already established communication with</p>	<p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. Here is the link to [resource] that we discussed in your [type of] appointment today!</i></p> <p>✓ <i>This is [Advisor name], your [type of] advisor at ETSU. After our recent advising appointment, remember to schedule your California Critical Thinking test here: [Link].</i></p> <p>✗ <i>This is [Advisor name], your [type of] advisor at ETSU. After our recent advising appointment, I think MATH-1530 fits better with your schedule.</i></p>	<p>Effective</p> <p>Effective</p> <p>Unauthorized</p>
<p>Time-oriented messages</p>	<p>✓ <i>This is your [type of] ETSU Advisor. Intent to graduate deadline is December 2, 2025. It is Nov. 21st, if you have not filed yet, make sure to do so asap here: [Link to file for graduation].</i></p> <p>✗ <i>The withdrawal deadline is September 7, and it is currently August 1. Watch your timeline if you plan on withdrawing from a course.</i></p> <p>✗ <i>Seniors, while it's the first day of classes, make sure to file your intent to graduate by November 1.</i></p>	<p>Effective</p> <p>Unauthorized</p> <p>Unauthorized</p>