

# Student Lists



Help Center Manager

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**Where:** Student Lists can be found, created, or used in several parts of the platform: the user profiles of Staff/Faculty who have created a Student List; the “Lists and Searches” page (found on the left-hand sidebar); within search options in Advanced Search and Reports, and within the filters in Intervention Effectiveness. They were previously called Watch Lists.

**Who:** Student Lists are a tool for student success staff and faculty who work to support student success efforts. They can also be useful tools for leaders at your institution to track information about a group of students.

**Conditions:** Student Lists are frequently used within the **Strategic Care** module for faculty and staff to track lists of students for outreach. They also serve an important role within the **Intelligence** module, where they can be used to easily pull reports on a key population of students or track their outcomes over time.

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## Feature Overview

A Student List is a static list of students by student ID. You can use Student Lists in a variety of ways, from maintaining a list of students to track over time in Intervention Effectiveness or offline, to sending messages or appointment campaigns directly from the Student List.

### Creating Student Lists

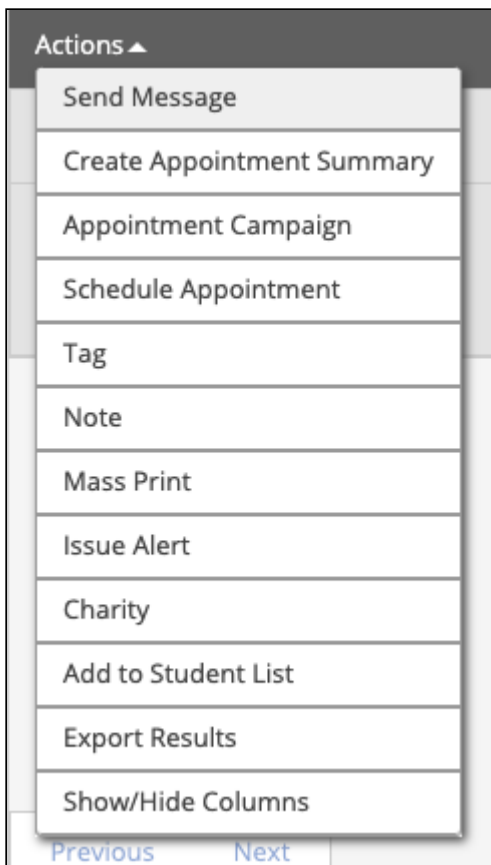
There are several ways to create a Student List or add students to a Student List.

**Note:** Because some tools in the platform (e.g., Intervention Effectiveness) display *all* Student Lists in the platform, please use a standard naming convention for your Student Lists that clearly explains the purpose of the list (e.g., F17 Senior His Maj, F17 Transfer 1<sup>st</sup> Gen). Talk to your Application Administrator or Student Success Leadership team if you have questions about the naming conventions for Student Lists at your institution.

#### Option 1 – Create Student List or add students through Advanced Search

Navigate to Advanced Search and find a population of students through the filters. Once the list of students has populated, select all students you wish to add to the Student List by selecting the gray box next to their name, or by selecting the entire list by clicking on the gray All box. After selecting your students, click on the Actions Menu:

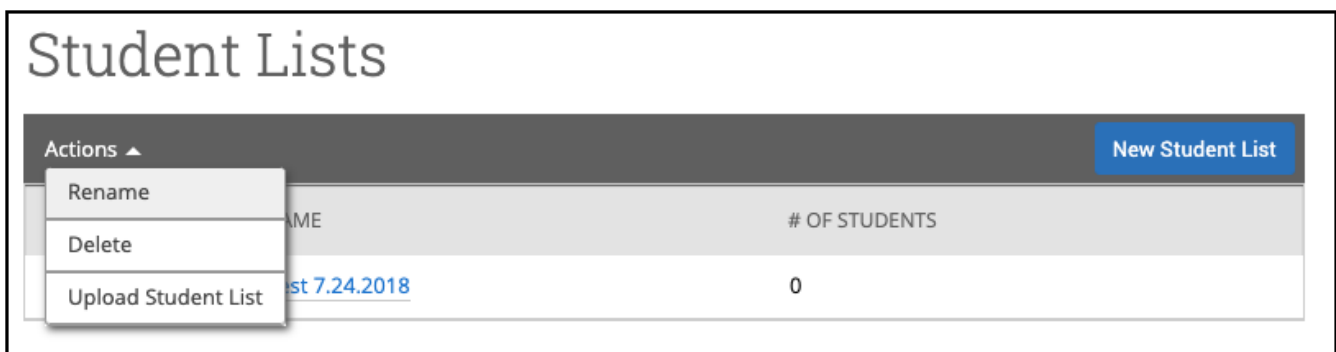
1. From here, select Add to Student List at the bottom of the list:
2. You may either add students to an existing Student List or you may select Create New List.
3. Once you name your list, click Save. You have saved a static list of students that will not change over time.



## Option 2 – Upload Student List from a list of Student IDs

You can also upload a list of students into the platform from Excel to create Student Lists. Note that the Excel file must be in a Comma Separated Values (.csv) format.

1. Open Navigate Staff.
2. Navigate to the Lists and Search page.
3. In the **Actions** menu of Student Lists, select **Upload Student List**.



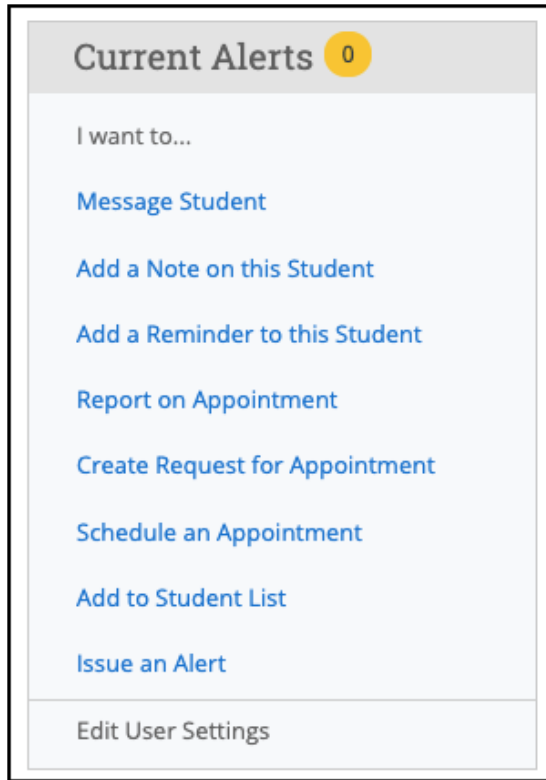
### *Upload Student List in Actions Menu*

4. Create a new Student List or add the students in your list to an existing Student List.
5. Select the file and upload it.
6. Choose the column that represents Student ID and then finish the import.

**Note:** You must ensure that the column containing the student IDs in the .csv file is expanded (i.e., the column must be wide enough to display the entire ID), or the system cannot read it correctly.

### Option 3 – Add Students to Student List from Student Profile

On the right-hand side of the student profile page in Navigate, use the Actions box to select the “Add to Student List” button.



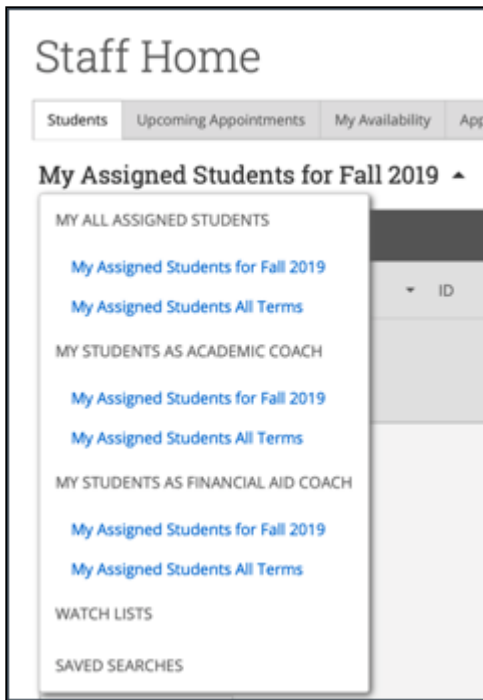
From here, you can choose which Student List or Student Lists to add the student to, or you can create a new Student List and add the student to it.

### Using Student Lists in Strategic Care and Intelligence

Once you've created a Student List, there are several areas within Navigate you may access them:

#### Staff Home Page

The first place will be your home page. By clicking on “**My All Assigned Students**”, you will be able to select from **any of your saved searches or Student Lists to display on your home screen instead of the default list of Assigned Students.**



## Lists and Searches Tab

Your Student Lists and Saved Searches also have their own tab. You can find it under the left-hand **Navigation Menu as "Lists and Searches"**:



Under this menu, you may access your saved searches and Student Lists. Additionally, you may upload new lists from this page as well. You can open a Student List by clicking the Student List

name.

<input type="checkbox"/>	NAME	# OF STUDENTS
<input type="checkbox"/>	<a href="#">Test 7.24.2018</a>	0

After opening a Student List, you can modify, delete, or save a different version of the Student List from this screen.

<input type="checkbox"/>	ALL	STUDENT NAME	ID	CONCERN	CATEGORY
<input type="checkbox"/>	1	<a href="#">Achalger, Camila</a>	732079886	High	
<input type="checkbox"/>	2	<a href="#">Askam, Imani</a>	899402625	High	Basketball, Rock Climbing Club
<input type="checkbox"/>	3	<a href="#">Atteberry, Guadalupe</a>	131491742	Unknown	
<input type="checkbox"/>	4	<a href="#">Averbeck, Viho</a>	141001885	Unknown	
<input type="checkbox"/>	5	<a href="#">Bedenbaugh, Casey</a>	137300693	Unknown	
<input type="checkbox"/>	6	<a href="#">Beere, Pete</a>	238231834	High	
<input type="checkbox"/>	7	<a href="#">Blacklock, Kella</a>	371528326	High	Lacrosse
<input type="checkbox"/>	8	<a href="#">Bonney, Kaden</a>	109132146	Unknown	

Previous 1 Next 97 total results

### Advanced Search

Under the “**Student Information**” drawer, you may select one or more Student Lists as a search filter to help you narrow down your results:

## New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

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**Student Information** First Name, Last Name, Student ID, Category, Tag, Gender, Student List ▲

First Name?

Last Name?

From Last Name?

To Last Name?

Student ID?

Gender

Student List (In Any of These)

E-mail(s)

Category (In Any of these)?

Category (In All of these)?

Category (In None of these)?

Tag (In Any of these)?

## Intervention Effectiveness

Within the Intervention Effectiveness tool, you can use Student Lists to select a population of students and analyze changes in outcomes for those students over time, and/or compare their outcomes to those of other students.

### Intervention Information

APPT. CAMPAIGN OWNER

APPT. CAMPAIGN

CAMPAIGN APPT. STATUS

STUDENT LIST CREATOR

STUDENT LIST

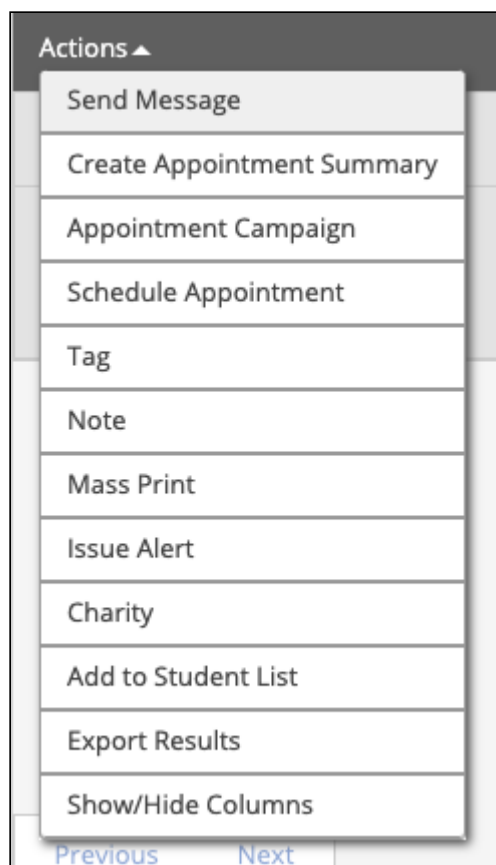
## Using the Actions Menu with Student Lists

1. Open a Student List from the Advanced Search, in the Lists and Search tab, or from the Reports.
2. Click the box or boxes next to the student you want to take action on.

At Risk Spring 2017

ALL	STUDENT NAME	ID	CONCERN	CATEGORY
<input type="checkbox"/>	Achziger, Camila	732079886	High	
<input type="checkbox"/>	Askam, Imani	899402625	High	Basketball, Rock Climbing Club
<input checked="" type="checkbox"/>	Atteberry, Guadalupe	131491742	Unknown	
<input checked="" type="checkbox"/>	Averbeck, Viho	141001885	Unknown	
<input type="checkbox"/>	Bedenbaugh, Casey	137300693	Unknown	
<input checked="" type="checkbox"/>	Beere, Pete	238231834	High	
<input type="checkbox"/>	Blacklock, Kella	371528326	High	Lacrosse
<input type="checkbox"/>	Bonney, Kaden	109132146	Unknown	

3. Open the Actions menu and select one of the items. The actions are described below.



- **Send Message:** Opens a "Send a Message" box that allows user to send an email or text message (with or without an attachment) to the students selected.
  - **Create Appointment Summary:** Creates an appointment summary report for the selected students to record an appointment with them.
  - **Appointment Campaign:** Creates an appointment campaign starting with the students added.
  - **Schedule Appointment:** Opens the Schedule Appointment page. Users can then schedule appointments for the student.
- Warning:** If multiple students are selected, the appointment will begin as a group appointment.



- **Tag:** Allows users to select tags to add to the student's profile.  
**Warning:** Choosing this action does not allow user to create new tags.
- **Note:** Adds a note to the student profile.
- **Mass Print:** Enables users to mass print Custom Student Reports and Student Calendars from the search results.
- **Issue Alert:** Opens the Issue Alert dialog box and marks a student at-risk. **NOTE:** can only be used for one student at a time.
- **Add to Student List:** Add student(s) to another Student List
- **Charity/Study Hall:** Adds time that student has spent in Study Hall to their information on the platform.
- **Export Results:** Creates a CSV file of students that downloads to your computer and can be used with other systems.

## Frequently Asked Questions

*Can I see another user's Student List?*

Yes, if you have the permission to search for Non-Students, you can navigate to the page of the user whose Student List you'd like to see, and follow the steps above for viewing Student Lists on the Advisor or Staff homepage.

*What is the character limit for Student List titles?*

32 characters.

*I added a Student List, why isn't it appearing in the filter dropdown in Intervention Effectiveness?*

Intervention Effectiveness is developed in a separate application from the rest of the Navigate platform, and data from Navigate loads into Intervention Effectiveness nightly. After you have created or updated a Student List in Navigate, please allow one day for it to appear in Intervention Effectiveness.

*How is a Student List different from a Saved Search?*

A saved search is a saved set of parameters – each time you run a saved search, it will return the set of students who currently meet those parameters. For example, if you create a saved search for Freshmen, the list of students who return for that saved search a year later will be different than at the time of its creation, as many of the freshmen will no longer be in that classification. A Student List, on the other hand, is a static list of students, saved by their student ID, and the list of students will remain the same over time.

*If I delete an old Student List I used to create a campaign, will the deletion have any impact on campaign data?*

This shouldn't have any impact. The Student List, like any Advanced Search filters used, is only initially relevant for helping query the list of students you want to be a part of the campaign. Once they have been added to the campaign how they were added (category, list, filter) does not matter so changes to Student Lists would not impact campaigns that have already been built/executed.

## Related Articles

- [Strategic Care - Advanced Search](#)
- [Strategic Care - Saved Searches](#)
- [Strategic Care - Reports](#)
- [Intelligence - Intervention Effectiveness](#)
- [Identifying & Intervening with At-Risk Students](#)
- [Identifying Specific Student Populations](#)

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