

 Search

Staff Home



Help Center Manager

1 month ago · Updated

[Follow](#)

Where: Staff Home will open when non-Application Administrators with the Staff standard user type log into Navigate. You can also reach Staff Home by clicking the **Home icon** in the Navigate left sidebar.

Who: This feature is the primary landing page for **staff** upon entering Navigate.

Conditions: This feature is enabled if you are able to log in to Navigate. Depending on your role configuration within Navigate, there may be some parts of this feature that are not visible to you.

Table of Contents

- [Feature Overview](#)
 - [Actions](#)
 - [Quick Links](#)
 - [Reminders](#)
 - [Students](#)
 - [Upcoming Appointments Tab](#)
 - [My Availability](#)
 - [Appointment Queues](#)
 - [Appointment Requests](#)

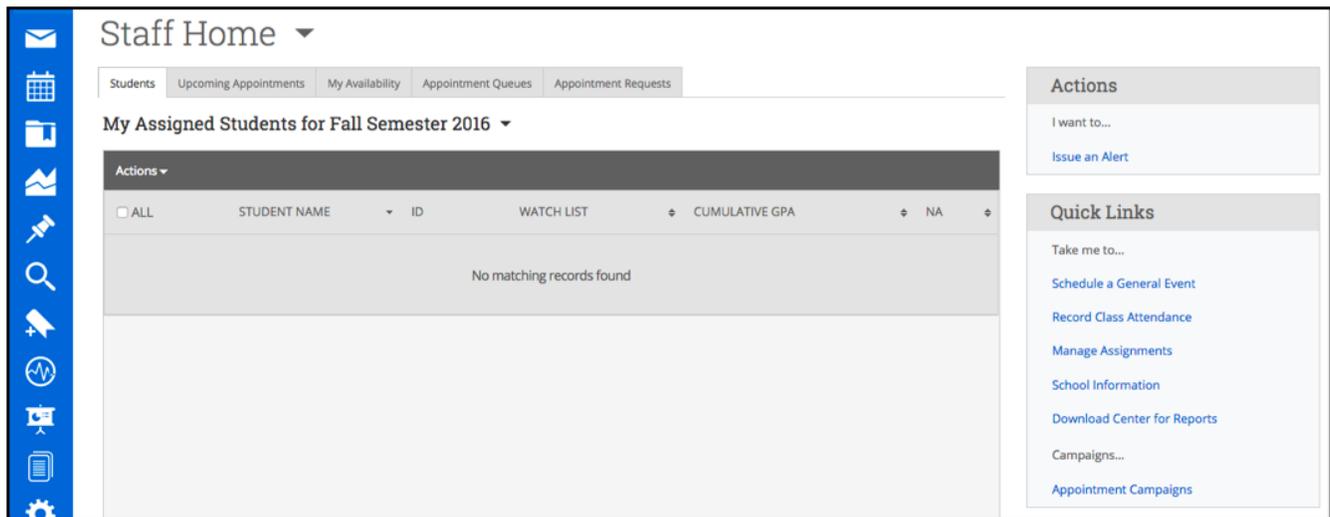
- [Frequently Asked Questions](#)
- [Related Articles](#)

Feature Overview

The Staff Home page is where most users arrive when opening Navigate. It allows users to view key tools that enable them to take action on student success-related tasks.

Features available within the Staff Home are configured to the needs of each institution. Your institution may not have enabled certain tools for your role, or they may have changed the language related to your role to meet its needs. As a result, that the images and information below may not exactly match what you see on your screen.

The Staff Home page will be your jumping-off point into the Strategic Care pillar within the Navigate platform. Check out the [related articles](#) listed at the bottom of this article to learn more about how the Staff Home page fits into getting started with Navigate and as part of your daily workflow.



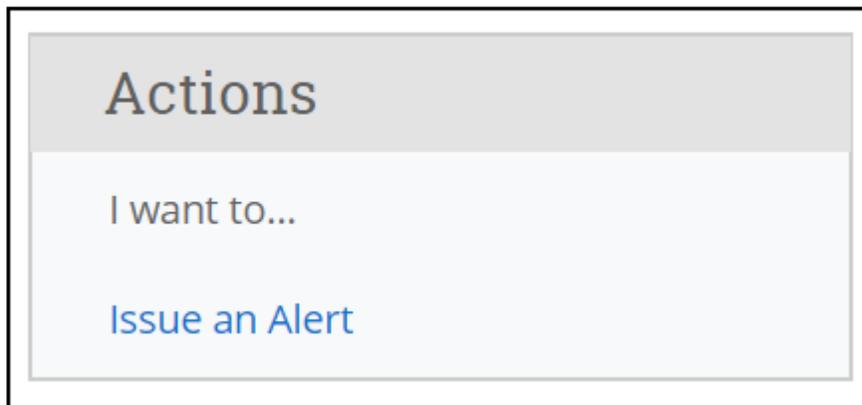
The Staff Home page is composed of distinct tabs (**Students**, **Upcoming Appointments**, **My Availability**, **Appointment Queues**, and **Appointment Requests**) in addition to overview boxes (**Actions**, **Quick Links**, and **Upcoming Appointments**) containing high level information. Click on a link below to learn more about each feature:

- [Actions](#)
 - [Quick Links](#)
 - [Reminders](#)
 - [Students](#)
-
- [My Assigned Students](#)
 - [Reporting](#)
 - [Upcoming Appointments](#)

- [Upcoming Appointments Tab](#)
- [My Availability](#)
- [Appointment Queues](#)
- [Appointment Requests](#)

Actions

The **Actions** menu is found on the right-hand side of the home page. The actions that appear as options depend on your role and the features your institution has activated in Navigate. This part of the Home Page may have a different list of actions than those you see on an individual Student Profile or other sections of the platform.



The default action is to Issue an Alert. From this link, you are able to issue an ad hoc student alert. For more information about issuing alerts, check out this [article](#).

ISSUE AN ALERT ✕

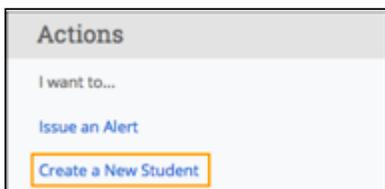
Student

Please select the reason you believe this student needs assistance

Is this alert associated with a specific class?

Additional Comments

You may also have the ability to Create a New Student, usually used to create a prospective student.



Note: If you have more than one role, your Actions Menu may be affected by the permissions for both roles.

Quick Links

Quick Links is a section on your Home page that provides easy access to different features within the platform, such as scheduling, recording attendance, or tracking appointment campaigns. Clicking on a quick link will direct you to different locations in the Navigate platform. The links that display are specific to your role at your institution and may not exactly mirror those shown in the screenshot below.

Quick Links

Take me to...

[Schedule a General Event](#)

[Record Class Attendance](#)

[Manage Assignments](#)

[School Information](#)

[Download Center for Reports](#)

Campaigns...

[Appointment Campaigns](#)

[Travel Letters](#)

[Book Slip Campaign](#)

Note: If you have more than one role, your Quick Links may be affected by the permissions for both roles.

Reminders

Once you have taken an initial action, like setting up a meeting with a student, you may have no further work to perform at the present time. However, you may want to revisit the student's information in the future. In this case, the platform provides staff and faculty with the ability to set a **Reminder** about a particular student.

Reminders will show on the right side of your home page just under the Quick Links section. You can also view all created reminders by selecting the "Reminders" page from the left navigation bar.

Reminders

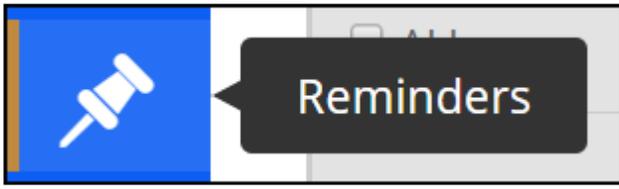


register for spring

[Sarah Bedore](#)

12/17/2015

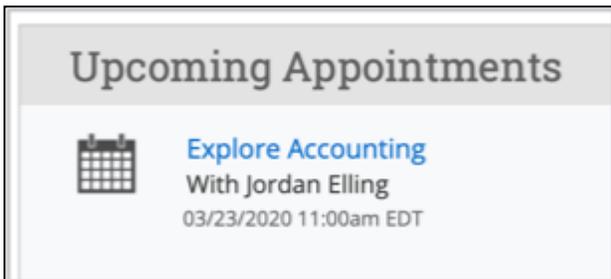
[view more](#)



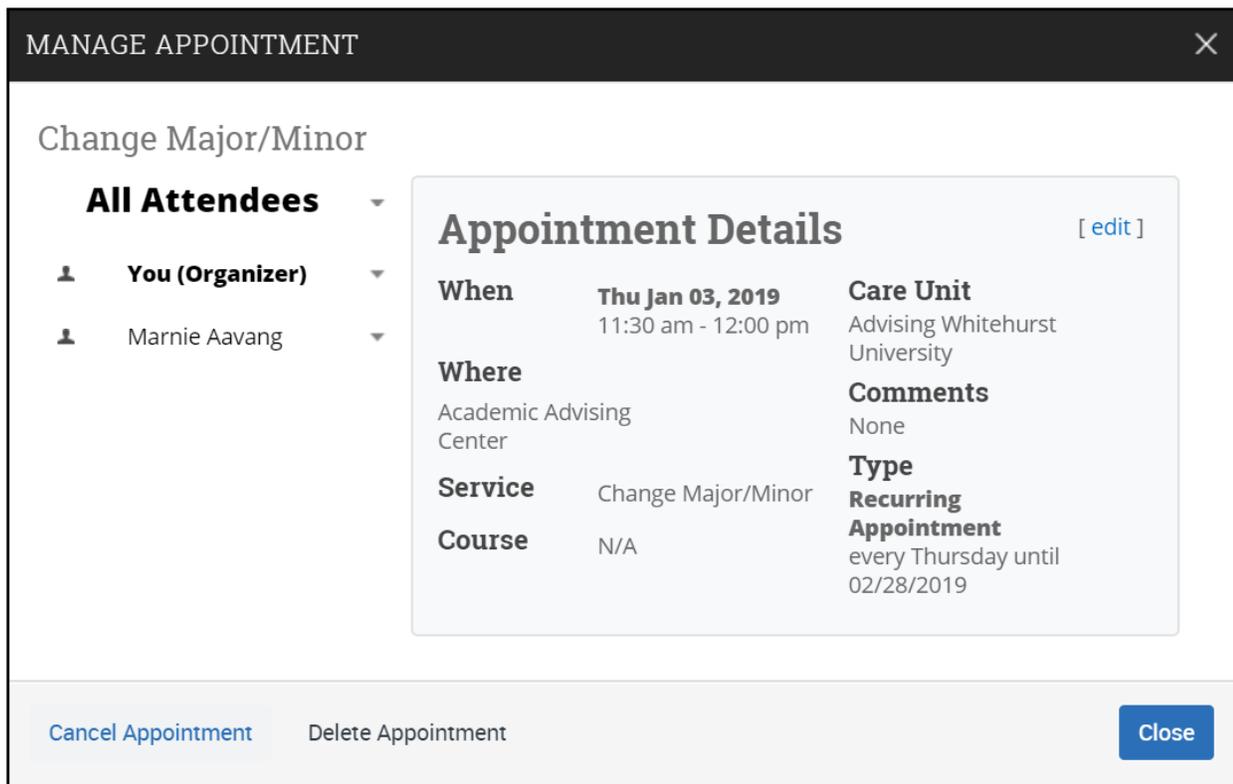
Note: Reminders are ONLY visible to the person who created them and NOT visible to the student.

Upcoming Appointments

The **Upcoming Appointments** box shows you quick details of your next three scheduled appointments. Appointments are listed in chronological order with the time zone of your institution displayed.



For more detailed information, click on the **Upcoming Appointments tab** where you can see all of your upcoming appointments in the next 30 days. Clicking on the appointment link itself will take you directly to the appointment details.

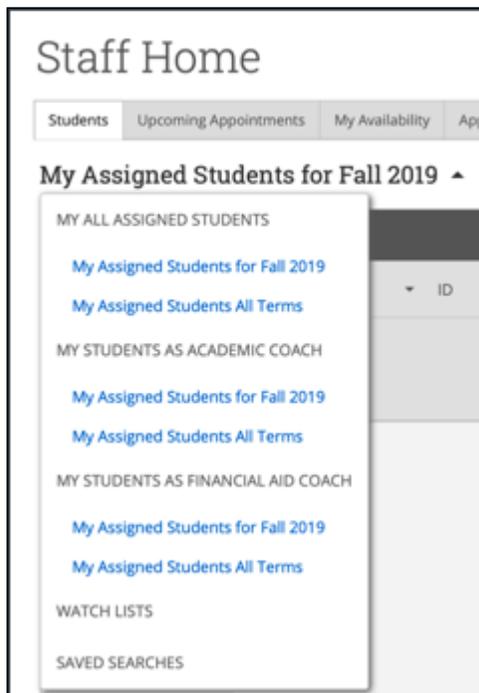


Students Tab

The Students tab collects student-specific content for staff members, including information regarding assigned students

My Assigned Students

The **My Assigned Students** grid gives you a quick and easy way to view and interact with groups of students that have identified as being of particular interest to you. This is based on the term and the relationship between yourself and the student. For example, if you are an Academic Coach and a Financial Aid Coach, you will see these students in different lists that also filters based on current term and all terms, as shown in the screenshot below.



There is also the **My All Assigned Students** which shows all students assigned to you in any relationship for either the term or for all time. Once you have selected one of these options, a list of students will appear on Staff Home.

You will notice several key pieces of information next to each student's name in the grid: their student ID, whether they are on one of your student lists, their cumulative GPA, and their predicted risk level. From this grid, you can take many different actions on these students, depending on your user permissions. These actions could include: sending messages, creating appointment summary reports, scheduling appointments, adding a student to a student list, issuing alerts, adding notes, or exporting a list of included students.

My Assigned Students For Fall Semester 2017 ▾

| Actions ▾ | | | | | | |
|------------------------------|------------------------------------|-----------|------------|------------|-----------|---|
| <input type="checkbox"/> ALL | STUDENT NAME ▾ | ID | WATCH LIST | ↕ CUM. GPA | ↕ CONCERN | ↕ |
| <input type="checkbox"/> | 1 Aavang, Marnie | 610832550 | | 2.42 | High | |
| <input type="checkbox"/> | 2 Abramian, Walton | 344590587 | | 2.76 | High | |
| <input type="checkbox"/> | 3 Abuhl, Dirk | 608618056 | | 4.02 | Unknown | |
| <input type="checkbox"/> | 4 Aceves, Cortez | 308067265 | | 3.84 | Low | |
| <input type="checkbox"/> | 5 Acree, Genet | 423176256 | | 2.90 | High | |
| <input type="checkbox"/> | 6 Acres, Hasad | 713764286 | | 2.99 | Low | |
| <input type="checkbox"/> | 7 Addison, Raymon | 803583883 | | 3.40 | Low | |
| <input type="checkbox"/> | 8 Aeillo, Reagan | 061632798 | | 2.10 | High | |

In addition to seeing lists of assigned students for the current term, you can use the down arrow to toggle to a previous term, to view assigned students for all terms, to see students associated with a static [student list](#), or review students included in a dynamic [saved search](#).

Note: If you do not see any students on your grid, it is likely that your students have not been assigned to you yet. Please contact your Application Administrator with questions regarding your assigned students.

Reporting

At the bottom of Staff Home page is the **Reporting** section. Here, you will find a list of all your recent appointments as well as any appointment reports you have filed.

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit:

| Actions ▾ | | | | | | | | | Show Cancelled |
|--------------------------|-----------------------------------|--------------------|--------|--------------------------------------|----------------------------------|--------|--------------------------------|-------------------------|----------------|
| <input type="checkbox"/> | DATE | ↕ SERVICE | COURSE | COMMENT | ATTENDEE | ↕ TIME | REPORT FILED? ↕ | DETAILS | |
| <input type="checkbox"/> | 1/1 12/12/2018 09:00a - 10:00a | General Advising | N/A | | Aavang, Marnie | 60 min | Report Details | Details | |
| <input type="checkbox"/> | 1/1 12/11/2018 12:30p - 01:00p | Change Major/Minor | N/A | Delphina Aarons: additional comments | Aarons, Delphina | 30 min | Not Yet. | Details | |

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit:

Actions ▼ Show Cancelled

| <input type="checkbox"/> | DATE | ↕ SERVICE | COURSE | COMMENT | ATTENDEE | ↕ TIME | REPORT FILED? ↕ | DETAILS |
|---|------|-----------|--------|---------|----------|--------|--------------------|---------|
| You have not had any recent appointments in the last 90 days. | | | | | | | | |

Recent Appointments

This tab displays all your recent appointments with high-level information about those interactions, including the date of the appointment, the service provided in the appointment, the related course (if applicable), any comments, the attendee, the duration of the appointment, and whether or not an appointment report has been filed. From the Actions menu in the top left-hand corner, you have the option to add an [Appointment Summary Report](#) to an appointment, to mark a student as a no-show, or issue an alert. You can also filter your appointments by care unit by using the drop-down selector. If you have not had any recent appointments in the last 90 days, this will show in the tab instead.

Recent Reports You Created

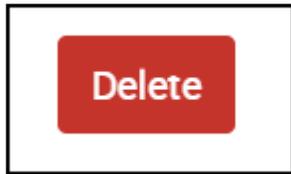
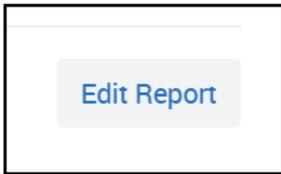
The **Recent Reports You Created** tab lists all appointment summary reports you have created for the current term.

Reporting

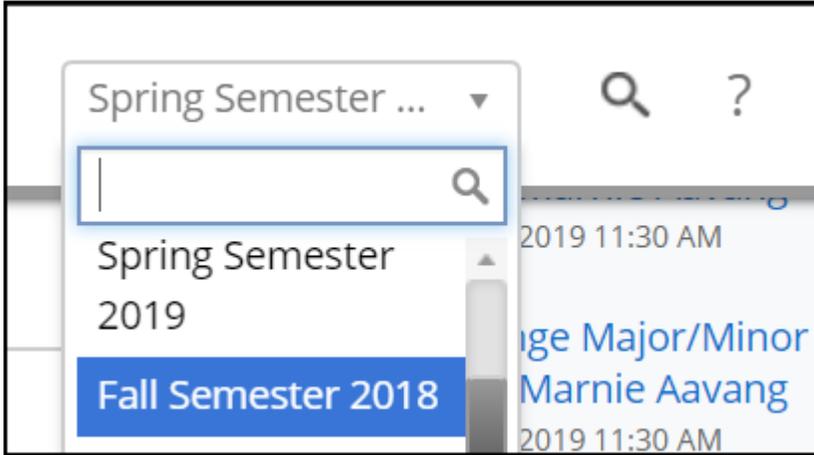
Recent Appointments Recent Reports You Created

| DATE | STUDENT NAME | SUMMARY | FOLLOW-UP? | DETAILS |
|------------|--------------------------------|---------|------------|--|
| 01/02/2019 | Aavang, Marnie | | No | Details Delete |

This grid will display all of your filed appointment summary reports, sorted by most recent to least recent. From here you can click the **Details** link to view a report, **edit** the report's content, or **delete** the report. Please note that the ability to edit or delete reports is permission-based and may not be an option available to all users.



Please note that if you file a report for an appointment that occurred in a different term, you will need to select the term in which you filed the report via the Global Term Selector in the top bar of the page in order for the report to appear in this tab.



Upcoming Appointments Tab

The second tab on the Staff Home is the **Upcoming Appointments tab**. This page lists your upcoming appointments for the next 30 days, as well as your recent appointments and any reports you have filed about those students.

| Upcoming Appointments | | | | | | | |
|--|--------------------------------------|----------------|---------------|--------------------|---------|---------------|-------------------------|
| Care Unit: <input type="text" value="All care units"/> | | | | | | | |
| Actions | | | | | | | Show Cancelled |
| <input type="checkbox"/> | DATE | ATTENDEE | TIME | SERVICE | COMMENT | REPORT FILED? | DETAILS |
| <input type="checkbox"/> | 1/1 01/03/2019 11:30a - 12:00p | Aavang, Marnie | 11:30a-12:00p | Change Major/Minor | | Not Yet. | Details |

The usual sidebar is also on this tab, allowing you to see different reminders and actions you can take.

My Availability Tab

One of the most critical pieces of functionality within Navigate is the ability to schedule appointments with students. In order to facilitate these interactions, you must first define the days and times you

will be available to meet with students. The times you are available to meet with students, in addition to the services for which you are able to provide, compose your 'availability'; on this tab, you are able to manage your appointment availability for all Care Units accessible to your role.

| Available Times | | | | | | | |
|-----------------------|----------------------------|-----------------|---------|--------------------------|--|------------------|----------------------|
| Actions ▾ | | | | | | | |
| SELECT | DAYS OF WEEK | TIMES | DATES | LOCATION | PURPOSE | CARE UNIT | |
| <input type="radio"/> | Mon, Tue, Wed, Thu, Fri | 8:00a- 4:00p | Forever | Business Advising Center | Change Major/Minor, Changes to my Schedule, Selecting a Major For: Appointments/Drop-Ins | General Advising | Edit |

For more information about setting your availability, please see [this article](#).

Appointment Queues Tab

The **Appointment Queues** tab shows a list of students checked in for their appointments (including virtual check-ins), students in your queue, and students in other queues.

| Staff Home ▾ | | | | | | | |
|---|---|-----------------|--------------------|----------------------|--------------------|---------------|---------------|
| Students | Upcoming Appointments | My Availability | Appointment Queues | Appointment Requests | | | |
| Notification Methods: <input type="checkbox"/> Ding <input type="checkbox"/> E-Mail <input type="checkbox"/> Text Message | | | | | | | |
| Students Checked In For Appointments | | | | | | | |
| Actions ▾ | | | | | | | |
| SELECT | NAME | | | SERVICE | | | |
| There are not any student appointments checked in | | | | | | | |
| Students Checked In For Drop-Ins With Me | | | | | | | |
| Actions ▾ | | | | | | | |
| SELECT | NAME | SERVICE | COMMENT | FIRST AVAILABLE | PRIORITIZED AT | CHECKED IN AT | WAIT DURATION |
| You do not have any students currently waiting | | | | | | | |
| In-Progress Visits | | | | | | | |
| Actions ▾ | | | | | | | |
| SELECT | ATTENDEE NAME: STUDENT ID | START TIME | APPT TIME | CHECK IN TIME | SERVICE | COURSE | |
| <input type="radio"/> | Autumn Allgaeuer: 492965975 | N/A | 11/06/2018 05:46p | 5:46p | Change Major/Minor | N/A | |
| <input type="radio"/> | Marnie Aavang: 112233 | N/A | 11/06/2018 12:00p | 5:47p | Change Major/Minor | N/A | |
| Students In Other Staff Queues | | | | | | | |
| Actions ▾ | | | | | | | |
| SELECT | NAME | STAFF | SERVICE | COMMENT | PRIORITIZED AT | CHECKED IN AT | WAIT DURATION |
| There are currently no students waiting on other staff | | | | | | | |
| Students Checked In For Track Time ? | | | | | | | |
| Actions ▾ | | | | | | | |
| SELECT | NAME | SERVICE | COURSE | | CHECKED IN AT | | |

This tab is helpful when managing drop in appointments or monitoring appointment progress.

Student Checked In for Appointments

Students Checked In For Appointments

| Actions ▾ | | |
|-----------------------|-----------------------------|-----------------|
| SELECT | NAME | SERVICE |
| <input type="radio"/> | Aquil, Amos | Degree Planning |

Students will appear in this table if the staff user has a scheduled appointment and the student has checked in for that appointment.

Students Checked In For Appointments

| Actions ▲ | | NAME |
|-----------------------|--|-----------------------------|
| <input type="radio"/> | <ul style="list-style-type: none"> Start Appointment Send Message Check Out Remove | Aquil, Amos |

Actions in this table:

- **Start Appointment:** opens Appointment Summary report and moves student to the 'In-Progress Visits' queue. We suggest you send a message to a student when you start the appointment if it is a remote/virtual appointment.
- **Send Message:** sends message to student
- **Check out:** checks the student out
- **Remove:** removes student check-in and check-in data

Students Checked In for Drop In with Me

Students Checked In For Drop-Ins With Me

| Actions ▾ | | | | | | | |
|-----------------------|--------------------------------|--------------------|---------|-----------------|----------------|---------------|---------------|
| SELECT | NAME | SERVICE | COMMENT | FIRST AVAILABLE | PRIORITIZED AT | CHECKED IN AT | WAIT DURATION |
| <input type="radio"/> | Myracle, Aaron | Change Major/Minor | Hello! | No | | 5:35p | 2 min |

Students will appear in this table if the staff user has drop-in availability established and the student has checked in to visit with either First Available or with this staff user specifically for a drop-in visit.

You will see 'Yes' or 'No' in the 'First Available' column to indicating if the drop-in is for First Available or not.

Students Checked In For Drop-Ins With Me

Actions ▲

- Start Appointment
- Not Attended To
- Move to First Available
- Send Message
- Checkout
- Remove

| SERVICE | COMMENT |
|-----------------------------|---------|
| You do not have any student | |

Actions in this table:

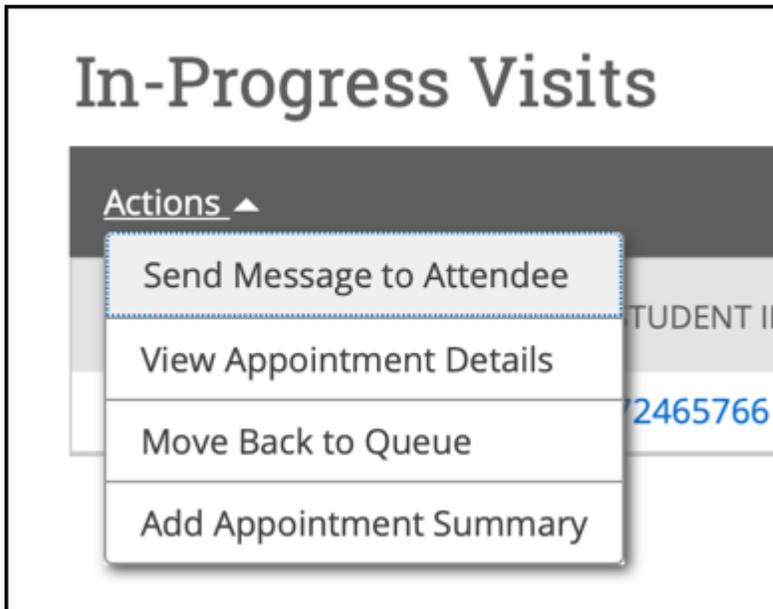
- **Start Appointment:** opens Appointment Summary and moves student to the 'In-Progress Visits' queue
- **Not Attended To:** removes the student from the queue but holds the check-in time. This is used if the student left or you ran out of time for drop-ins.
- **Move to First Available:** moves the student from the staff-specific queue to the First Available Queue and notifies other staff users that the student has been added to their queue
- **Send Message:** sends message to student
- **Check out:** checks student out
- **Remove:** removes check in and data from check in time

In-Progress Visits

| SELECT | ATTENDEE NAME: STUDENT ID | START TIME | APPT TIME | CHECK IN TIME | SERVICE | COURSE |
|-----------------------|--|-------------------|-------------------|---------------|--------------------|--------|
| <input type="radio"/> | Aaron Myracle: 072465766 | 11/27/2018 06:32p | 11/27/2018 05:35p | 5:35p | Change Major/Minor | N/A |

Students will appear in this queue when an appointment is started from either the 'Students Checked In For Appointments' or 'Students Checked In For Drop-Ins With Me' queues. While a student is in the 'In-Progress' queue, the student can only be checked out from this queue or the In-Progress queue in Appointment Center. Staff can also star the Summary and choose 'Save and Check out'.

Note: If you start an appointment and populates the Appointment Summary and then minimizes or closes out the Appointment Summary, the student will remain in the 'In-Progress Visits' queue until you go back and click the 'Add Appointment Summary' link to finish the visit.



Actions in this table:

- **Send Message to Attendee:** sends message to the student
- **View Appointment Details:** allows you to see appointment information if this is a scheduled appointment
- **Move Back to Queue:** this action will move the student back to the initial state of the visit. This means the student will return to Drop-In Queues for specific staff, the First Available queue, or Checked In for an Appointment Queue
- **Add Appointment Summary:** this will open populate the Appointment Summary report to allow you to fill out the report for the appointment you started

Students in Other Staff Queues

| Students In Other Staff Queues | | | | | | | |
|--------------------------------|--------------|----------------|------------------|---------|----------------|---------------|---------------|
| Actions ▾ | | | | | | | |
| SELECT | NAME | STAFF | SERVICE | COMMENT | PRIORITIZED AT | CHECKED IN AT | WAIT DURATION |
| <input type="radio"/> | Ferch, Cyrus | Brown, Stephen | General Advising | | | 5:37p | 55 min |

Students will appear in this table if you have availability at a location for a Care Unit and a student has *dropped in* for another staff user at that same location.

Students In Other Staff Queues

| Actions | STAFF | SERVICE |
|--|----------------|----------------|
| <ul style="list-style-type: none"> Start Appointment Not Attended To Send Message Remove | Brown, Stephen | General Advisi |

Actions in this table:

- **Start Appointment:** opens Appointment Summary report and moves student to the 'In-Progress Visits' queue
- **Send Message:** sends message to student
- **Check out:** checks the student out
- **Remove:** removes student check-in and check-in data

Students Checked in for Track Time

Students Checked In For Track Time ?

| SELECT | NAME | SERVICE | COURSE | CHECKED IN AT |
|-----------------------|----------------|------------------|--------|---------------|
| <input type="radio"/> | Sastre, Tanith | Meet with Anyone | | 5:37p |

Students will appear in this table if they have checked in for a service that has been specified for "Track Time" at a particular location. No staff are identified in this table.

Students Checked In For Track Time ?

| Actions | NAME | SERVICE |
|---|----------------|--------------|
| <ul style="list-style-type: none"> Send Message Check Out | Sastre, Tanith | Meet with Ar |

Actions in this table:

- **Send Message:** sends message to student
- **Check out:** checks the student out

Appointment Requests Tab

The **Appointment Requests** tab lists all appointment requests and allows staff to take action on those requests. You can see the date and time of the request, the student name, the service requested, the course if applicable, and the preferred location.

| <input type="checkbox"/> | DATE/TIME | STUDENT | SERVICE | COURSE | LOCATION |
|--------------------------|---------------------|----------------|-------------------------|--------|--------------------------|
| <input type="checkbox"/> | 11/05/2018 03:23 PM | Johnson, David | JUST VIEW DROP-IN TIMES | N/A | Academic Advising Center |
| <input type="checkbox"/> | 11/05/2018 02:48 PM | Johnson, David | Changes to my Schedule | N/A | Business Advising Center |

You have the ability to sort your requests by care unit or by location. This can be helpful for users who provide multiple services across campus when managing their workload.

NOTE: Old requests (i.e. those from a past semester) will show up on the Appointment Requests tab. You will need to delete them to see only requests from the current term.

To take action on a particular request, check the box next to the student name and then click into the Actions down arrow:

- **Match Request:** Selecting this action opens the Schedule an Appointment screen. You can then select a specific day and time to meet with the student. Please read the Requested Meeting Time message from the student before creating the appointment.
- **Send Message:** Send a message to the student who made the request.
- **Delete Request:**

Frequently Asked Questions

If a user has more than one role, what is the order in which roles will appear on a user's profile?

The order should be Admin, Staff, Professor, Coach, and Student.

Related Articles

- [Strategic Care - Alerts](#)
- [Strategic Care - Availability](#)
- [Strategic Care - Calendar](#)
- [Managing My Schedule](#)
- [Getting Set Up](#)
- [Strategic Care - Appointment Summary Reports](#)
- [Strategic Care - Notes](#)
- [Strategic Care - Professor Home](#)

Was this article helpful?

0 out of 1 found this helpful

Have more questions? [Submit a request](#)

Return to top 

Comments

0 comments



Be the first to write a comment.

[Help Center](#)