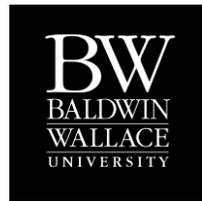




EAB



# **Onboarding Faculty, Instructors, Advisors & Mentors to the Navigate Platform**

**Navigate Reference Guide for Faculty & Staff**



EAB



Navigate at Baldwin Wallace University  
Office of Academic Advising & Retention

## Overview

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### Introduction

Faculty will be asked to submit alerts on and feedback for students in their courses at three key times in each semester. Faculty will receive an email during weeks 4 and 10 to complete a Progress report and an email requesting mid-term warnings.

Faculty should follow the instructions in the email and use this guide as support. Please feel welcome to contact the BW retention team with questions; see contact information below.

#### **IMPORTANT LINGO:**

**A Progress Report** – faculty complete Progress Reports to submit an Alert on students in their courses, helping to identify potential barriers to student success. Alerts trigger interventions, referrals, and outreach. Faculty Fellows and Student Success Mentors will intervene based on level of interventions. See Appendix A.

**Kudos** – faculty complete Progress Reports to also submit positive remarks on students in their courses. Help identify students who are doing well and/or have shown improvement. See Appendix C for types of kudos!

**Issue an Alert** – faculty and staff issue an alert to share critical information and to create referrals for student between support offices at any point during the semester. See Appendix B.

### BW'S RETENTION TEAM

**Lisa Henderson:** Associate Provost, [lhenders@bw.edu](mailto:lhenders@bw.edu)

**Dianna Spycher:** Director of Academic Advising & Retention, [dspycher@bw.edu](mailto:dspycher@bw.edu)  
Navigate Program Owner & Navigate Application Administrator

**Karley Beaudry:** Student Success Advisor/Case Manager, [kbeaudry@bw.edu](mailto:kbeaudry@bw.edu)

**Lynn Hulthen:** Academic Project Coordinator, [lhulthen@bw.edu](mailto:lhulthen@bw.edu)  
Navigate Assessment Consultant

**Kristin Brewer:** Assistant Director of Residence Life & Housing, [krebrewer@bw.edu](mailto:krbrewer@bw.edu)  
Student Success Mentor & Student Affairs rep.

**Julie Miller:** Associate Professor; Program Coordinator, Public Relations Program  
Faculty Liaison, Academic Advising, [jamiller@bw.edu](mailto:jamiller@bw.edu)



## Quick Start Guide for Using Navigate

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### GETTING STARTED

**STEP 1.** Access the Baldwin Wallace University Navigate using the following URL:

<https://bw.campus.eab.com/>

**STEP 2.** Log in to Navigate using your SSO credentials (BW username and password).

**CHECK ACCESS – IF YOU DO NOT HAVE ACCESS CONTACT DIANNA  
([dspycher@bw.edu](mailto:dspycher@bw.edu))**

### KEY PLATFORM FEATURES

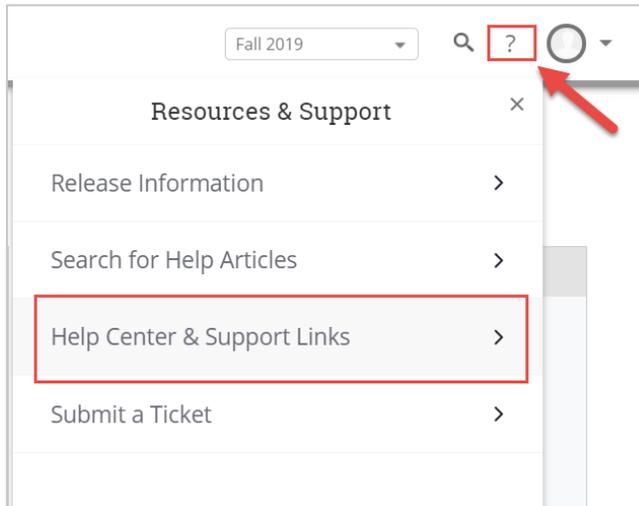
#### **Perform these key actions to identify, support, and report concerns on students:**

- **Complete a [Progress Report](#)** to submit alerts and concerns for students. Progress Reports will be distributed via email at two key times in each semester- weeks four and ten. Faculty Fellows, Student Success Mentors and support service offices will intervene based on level of interventions. *See Appendix A, C, and D.*
- **[Issue an Alert \(submit a concern\)](#)** throughout the year. Faculty Fellows, Student Success Mentors and support service offices will intervene based on level of interventions. *See Appendix B, C, and D.*
- **Reference the [Student Profile](#)** to note student's Academic progress and any areas of concern (e.g., GPA and number of DFWs). *See Appendix E.*



# Need Help? Access Navigate's Help Center

Visit the Navigate Help Center for articles and how-to instructions on all Navigate features and workflows.



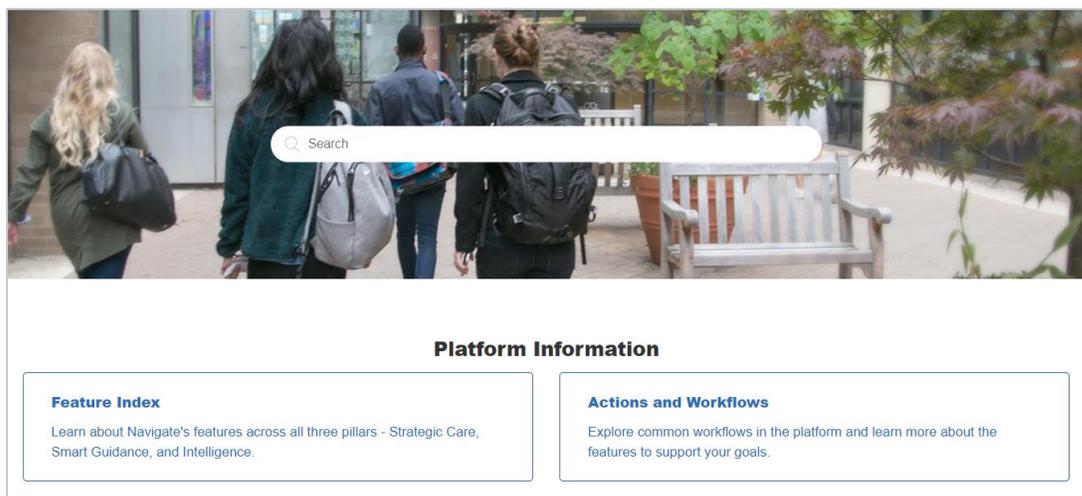
## Accessing the Help Center -

**Step 1:** Log in to Navigate.

**Step 2:** Click on the question mark icon in the top right-hand corner.

**Step 3:** Click Help Center & Support Links from the drop-down menu.

**Step 4:** Select "Help Center" to be taken to articles and step-by-step instructions for Navigate features and workflows. View the [Help Center Overview Video](#) to get the most from its resources!



### Tip:

Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)



For more detailed guidance, check out the [Help Center](#)!

Additional Questions? Email [dspycher@bw.edu](mailto:dspycher@bw.edu) for support!

# Appendix A: Complete a Progress Report

## Submitting a Progress Report

Navigate's [Progress Report](#) feature is used by faculty to share critical academic information on students enrolled in their courses. Use the instructions below to submit a Progress Report and mobilize support for a student.

**Step 1:** Access the Progress Reports either directly from the request email or by logging in to the Navigate platform and toggling to the Professor home page.

**Step 2:** Click "Fill out Progress Report" from email or home page.

**Step 3:** In the feedback screen, you will see a list of course sections and students for which feedback is being requested. This may or may not include all the students enrolled in your courses this semester.

**Step 4:** If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. Please fill out the remaining columns, including the comments section with additional detail that will help a mentor follow up with this student.

**Step 5:** When submitting your Progress Reports, you have the option to save as you go. Select "submit only marked students (but I am not done)". If you are finished filling out the progress report, select "Done with progress report. Submit unmarked students as not at risk (I'm all done)".

### Student Feedback

 **Your information is secure.**  
Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.  
Thank you!

**Professor Shubitz:**

You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

HIST-2112-A1-M American History II

Student Name	Do you have any feedback on this student?	Alert Reasons (You must choose at least one if the student is of concern)	Current Grade (Optional)	Additional Comments
1 [REDACTED]	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Dropdown menu]	[Dropdown menu]	[Text box]
2 [REDACTED]	<input type="radio"/> Yes <input type="radio"/> No	All of the Above Excessive Absences Low Participation Poor Grades	[Dropdown menu]	[Text box]

HIST-2112-C-M American History II

Student Name	Do you have any feedback on this student?	Alert Reasons (You must choose at least one if the student is of concern)	Current Grade (Optional)	Additional Comments
1 [REDACTED]	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons	[Dropdown menu]	[Text box]
2 [REDACTED]	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons	[Dropdown menu]	[Text box]
3 [REDACTED]	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons	[Dropdown menu]	[Text box]

**TIP:** Use the glossary of Alert Reasons (Appendix C) to understand what follow up action will be associated with each Alert Reason.



For more detailed guidance, check out this [video!](#)

# Appendix B: Issue an Alert

## Submitting a Concern About a Student

Navigate's [alerts](#) are used by faculty and staff to share critical information and to create referrals for a student between support offices. Use the instructions below to submit an alert and mobilize support for a student.

**Step 1:** Click the "Issue an Alert" link in the upper right-hand corner of your home page.

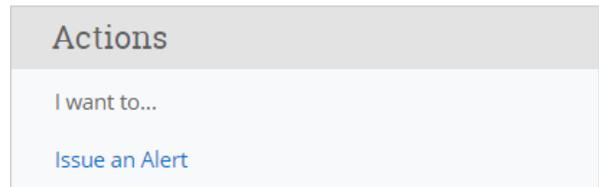
**Step 2:** Search for the student for whom you'd like to issue an alert (using name or ID).

**Step 3:** Select the reason(s) you believe the student needs assistance.

**Step 4:** If the alert is associated with a particular class, fill out that field.

**Step 5:** Lastly, please provide in the comments section any relevant context related to your reason for submitting the alert. Comments will help the team reviewing alerts to connect the student with the right resources in a timely fashion.

**Step 6:** Issuing an alert may open a case. You will receive an email notification when the case has been closed. If a case is not closed, someone may still be working with the student.



**TIP:** If there is an emergency situation, BW Safety & Security should be contacted at (440) 826 - 2000

A screenshot of a web form titled "ISSUE AN ALERT". The form has a dark header with the title and a close button (X). Below the header, there is a search field labeled "Student" with a magnifying glass icon. Below that is a section "Please select a reason for this alert" with a dropdown menu. The dropdown menu is open, showing a list of reasons: "Low Participation", "Poor Grades", "Referral - Tutoring", "Referral - Counseling", "Referral - Dean of Students", "Referral - Residence Life", and "Referral - Study Skills". The "Referral - Study Skills" option is highlighted in blue. Below the dropdown is a checkbox labeled "Is this alert associated with a specific class?". Below that is a text area labeled "Additional Comments" with the placeholder text "Please enter a comment.". At the bottom right of the form are two buttons: "Cancel" and "Submit".

**TIP:** Use the glossary of Alert Reasons (Appendix C) to understand what follow up action will be associated with each Alert Reason.



For more detailed guidance, check out the [Help Center!](#)

# Appendix C: Glossary of Alert & Kudos Reasons

## Alert Reasons

The Navigate platform allows faculty and staff to submit alerts on students. Below are the alert reasons and expected intervention/follow up.

Alert Reason	Description	Intervention
Concerning change in course engagement	e.g., stopped submitting; sudden change in test/quiz/assignment scores; disengaged in class discussions/participation	Opens case Case manager reviews
Concerning change in student behavior	e.g., change in appearance, sleeping in class, verbal outbursts	Opens case Case manager reviews
Excessive Absence/Tardiness	more than 3 absences	Opens case Case manager reviews
Enrollment Concerns	e.g., potential WD/LOA, dropping below full-time/12 credits status	Student receives an email Case manager reviews Advisor emailed
Never Attended		Student receives an email Case manager reviews Advisor emailed
Positive Alert - Improved Academic Performance	Kudos – improvement	Student receives an email
Positive Alert - Kudos, student is doing well	Kudos – doing well	Student receives an email
Other	Please Include Details in Comments	Case manager reviews
Referral – Office of Academic Advising	e.g., transient process, catalog change, discuss majors, withdraw process	Student receives an email with next steps
Referral - CASA	e.g., tutoring, academic coaching, reading support, and writing support	Student receives an email with next steps



**For more detailed guidance, reach out to Dianna ([dspycher@bw.edu](mailto:dspycher@bw.edu))!**

# Appendix D: Classroom Performance & Concerns

## Responding to Students' Classroom Performance & Concerns

Retention work involves all of us. Faculty are on the front lines and play a critical role in identifying concerning behaviors exhibited by students in the classroom and reporting about their performance in coursework. Given the relationships and regular interactions that typically occur between faculty and students in the classroom, sometimes the first, most effective step in addressing student concerns simply involve faculty talking directly to their students. This is strongly encouraged. Asking pertinent questions about the concerns; reviewing course expectations; and referring students to campus resources may be enough to redirect students in a positive direction.

However, when students begin to show patterns of concerning behaviors or exhibit sudden changes in demeanor, engagement, and/or academic performance, a team approach to providing support may be more impactful. In these cases, faculty are expected to use Navigate to report concerns. Faculty Fellows and/or Student Success Mentors are effective in providing guidance and identifying wrap-around interventions for these at-risk students.

The table below provides examples of alert reasons and identifies appropriate interventions.

Previous Alert Reason	Intervention
<b>1-2 Low test score(s)</b>	Faculty consult with student
<b>Low test score - more than 2</b>	Faculty refer to CASA
<b>1-2 Low quiz score(s)</b>	Faculty consult with student
<b>Low quiz score - more than 2</b>	Faculty refer to CASA
<b>Missing assignment</b>	Faculty consult with student
<b>Poor study habits</b>	Faculty refer to CASA
<b>Poor participation</b>	Faculty consult with student



**For more detailed guidance, reach out to Dianna (dspycher@bw.edu)!**

# Appendix E: Student Profile

## Viewing a Student Profile

The Student Profile aggregates all pertinent information about a student into one place.

**What:** The Student Profile shows key details about a student. The Overview is the main tab of the profile.

**Where:** The **Overview tab** is what you see when you open a Student Profile.

**Who:** Student Profiles give **staff** and **faculty** quick insight into the student's performance and potential needs.

Students assigned to you for advising are visible on **Staff Home**. For faculty, students in your classes are listed on **Professor Home**. Typing a student's name in the **quick search bar** brings you to more student and/or staff information.

## STUDENT PROFILE KEY FEATURES

- Within the Overview Tab, the "30-Second Gut Check" is your go-to spot for a high-level overview of a student's academic performance and progress. This information includes student GPA, courses, and the number of D/F/Ws.
- The information included within the Success Progress Tab provides additional context on a student's progression towards degree.
- The Courses Tab provides information regarding a student's enrollment history, along with grades achieved and credits awarded.
- The History Tab aggregates all recorded activity for a student, including appointments, alerts, cases, reminders, and notes.

### Elenor Abbott

Overview Success Progress History Course Info Major Explorer More ▾

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
3 ▾	0	0	0	0.78 ▾
Total Credits Earned	Credit Completion % at this Institution	Predicted Support Level		
64.00	50%	High <a href="#">View detail</a>		



For more detailed guidance, check out the [Help Center!](#)

## Appendix F: FAQ

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**QUESTION: How frequently should faculty instructors, advisors, and/or mentors be utilizing the platform?**

ANSWER: Submit progress reports for all students twice each semester, upon receiving a request to do so via email.

When a student expresses a concern or needs assistance outside of your area, issue an alert to prompt the relevant office(s) to work with the student.

Review a student's profile prior to each scheduled meeting.

**QUESTION: What specific functionality should faculty users be utilizing?**

ANSWER: (1) Submit progress reports, (2) express concerns by issuing an alert, and (3) review student profiles.

**QUESTION: What are Progress Reports?**

ANSWER: Progress reports are an early alert system designed to provide students timely feedback of instructor concerns/feedback about attendance, engagement, and/or academic performance at key points during the term.

**QUESTION: Who will be completing Progress Reports?**

ANSWER: All instructors are encouraged to complete progress reports each semester for each regular semester undergraduate course section they teach.

**QUESTION: How do I complete a Progress Report?**

ANSWER: [Watch the recorded demonstration](#). You will receive emails with a progress report link or log into professor home and you will have a banner requesting you to complete the progress report.

Step 1: Access the Progress Reports either directly from the request email or by logging in to the Navigate platform and toggling to the Professor home page. Your username and password are the same as your BW credentials.

Step 2: Click "Fill out Progress Report" from email or home page.

Step 3: In the feedback screen, you will see a list of course sections and students for which feedback is being requested. This may or may not include all the students enrolled in your courses this semester. Begin filling out feedback according to the instructions provided in the Progress Report request email.

Step 4: If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. Please fill out the remaining columns, including the comments section with additional detail that will help an advisor follow up with this student. **Only those students for whom you want to provide feedback on need to be marked (Yes).** You can choose one or more alert reasons that represent your feedback. Choose "Yes" for concern and for "Kudos:..." Provide additional context: **comments are intended for case managers to review.**

Step 5: When submitting your Progress Reports, you have the option to submit for only the students you have completed feedback (save as you go).

When you have finished providing feedback on students of concern, click the Submit button at the bottom of the screen. Click the second button If you have checked all your students for feedback and do not need to come back (I'm all done).

\*Reminder alerts are not sent until you click submit (I'm all done). You will not be able to re-open the progress report once you click submit (I'm all done).

Choose the first button if you need to save your progress and come back (but I'm not done).

**QUESTION: Why issue an alert?**

ANSWER: Alerts provide staff and faculty with the ability to draw attention to students or prompt a referral with another department using the platform. Alerts are completed as necessary year-round.

**QUESTION: Who does the alert go to?**

ANSWER: Alerts are sent to the specific staff or departments (see glossary of alert reasons in Appendix C).

**QUESTION: How do I issue an Alert from Professor Home Page?**

- ANSWER:
1. Log into Navigate: <https://bw.campus.eab.com/>.
  2. Change your role from Staff to Professor by clicking on the dropdown next to "Staff Home" and then select Professor.
  3. Check the box next to the student/students' names and select "Issue Alert" from the Actions drop-down menu.
  4. Selecting "Issue an Alert" will open the alerts dialogue box.
  5. Alert Reason: Select at least one reason for issuing this alert. Each Alert Reason chosen may open a case for the student. See progress report guide (Appendix A) for more information on alert reasons.
  6. Association with Specific Course: Choose the associated course the concern/feedback is related to.
  7. Additional Comments: Enter all comments related to this alert. Only the assigned mentor view the comments.
  8. Please provide your outreach methods in the comment section (i.e. I have reached out to the student in person and over email several times with little to no response). Include any other pertinent background information to assist mentors in their outreach.\*

*\*Remember - Any information you enter the platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).*

**QUESTION: How can I be sure my alerts/concerns/notes/Progress Reports are FERPA compliant?**

ANSWER: Follow these [FERPA Do's and Dont's](#):

DO:

- ✓ Briefly summarize conversation with student.
- ✓ Highlight recommendations, referrals, and follow-up plans.
- ✓ Write fact-based academic notes.
- ✓ Use general language concerning sensitive information. For example, use phrases like extenuating circumstances, difficult situation, personal situation.
- ✓ Record referrals made and resources shared. For example: "discussed resources at the Health Center" or "referred to the Student Resource Center."
- ✓ Include notes about positive student behaviors. For example, "Student came prepared" or "Student has talked to Career Services."

DON'T:

- × Summarize everything that was discussed.
- × Include personal and/or sensitive information.
- × Include speculation, subjective opinions, or judgments.
- × Include sensitive information, personal concerns, and/or private matters. For example, do not include details of a family situation, mention of an assault, specifics about a health issue. (*You can, however, refer a student to Counseling Services through the "issue an alert" function.*)
- × Report details surrounding sensitive referrals. For example, don't explain the situation that caused you to refer a student to the Counseling Center.
- × Include negative judgements about student behaviors (e.g., "I can't get her to be serious" or "He seems uninformed.").

**QUESTION: How can I issue an alert on one of my advisees?**

ANSWER: Students assigned to you for advising are visible on Staff Home. Find the student and click their name. You will be directed to the student's profile. Then, under options select "issue an alert."

**QUESTION: How do I view my issued alerts?**

ANSWER:

1. Issued alerts show on the Professor Home in the My Issued Alerts section (bottom of professor home page). This allows instructors to see alerts they have issued.
2. Instructors can click the case and see a window that explains which alert reasons opened the case, and the case outcome if the case has been closed.
3. To access the student's profile, you can click on the student's name or use the quick search in the top right of the Professor or Staff Home page. Staff can find alerts on their "Dashboard" page (click on the gauge icon in the left-side menu).

**QUESTION: How do I search for a student and submit an alert?**

ANSWER: There are 3 different ways to search for a student:

1. Class roster. For faculty, students in your classes are listed on Professor Home. This is an easy way to find a student to submit an alert on.
2. Advising roster. Students assigned to you for advising are visible on Staff Home.
3. Quick Search. Navigate has robust search capabilities. Typing a student's name in the quick search bar (or by student ID#) brings you to more student information.

**QUESTION: How can I find a student's profile?**

ANSWER: Search for the student (look at your class roster, your advising roster or use the quick search). Click on the student's name. you will be directed to the student profile.

**QUESTION: How do I view alerts on the student profile?**

ANSWER: Navigate to that student's profile. On the right side of the profile, the total number of staff alerts for that student is listed at the top right. This count includes all Alerts, Cases, and Progress Reports issued for the student based on the current term.

To view additional information about the issued alerts, either click directly on the "8 Alerts" hyperlink from the total count or navigate to the "History" tab (top of the student profile) and then scroll down to the student's history drop down.

**QUESTION: What can be done if I issued a progress report for the wrong student?**

ANSWER: Contact Dianna Spycher ([dspycher@bw.edu](mailto:dspycher@bw.edu)). Please provide the student's ID and the course number and name.

**QUESTION: Can progress reports be reopened after click "I'm all done?"**

ANSWER: No, but you can issue an alert for the student of concern.

**QUESTION: Do I need to issue an alert and submit a Progress report at the same time?**

ANSWER: No.

**QUESTION: Can I add multiple alerts for the same student?**

ANSWER: Yes!

**QUESTION: Where can I find my completed progress reports and issued alert?**

ANSWER: Issued alerts show on the Professor Home in the "My Issued Alerts" section (bottom of professor home page). This allows instructors to see alerts they have issued.

**QUESTION: A student is missing from my progress report, will they be added to the Progress Report?**

ANSWER: If the student added the course after the progress report opened then they will not be in the progress report roster. You can issue an alert if you have a concern for the student's progress.

If there are extra students or the student was in the course when the progress report opened, then contact Dianna Spycher ([dspycher@bw.edu](mailto:dspycher@bw.edu)).

**QUESTION: Do I need to reach out to my student before submitting a progress report of concern?**

ANSWER: Yes, reach out anytime you have a concern for a student. This is not a substitute for instructors directly reaching out to their students. It is designed to ensure advisors and the retention team have comprehensive information about their advisees/students so we can effectively provide resources and referrals.

**QUESTION: It is too early in the course to complete a progress report. What should I do?**

ANSWER: Instructors are encouraged to issue an alert for the student(s) of concern between progress report campaigns.

**QUESTION: Do adjunct faculty submit progress reports?**

ANSWER: Yes, all instructors teaching regular undergraduate courses should complete progress reports and issue alerts as needed.

**QUESTION: I do not have professor home role, how do I get access?**

ANSWER: Please contact Dianna Spycher ([dspycher@bw.edu](mailto:dspycher@bw.edu)).

**QUESTION: What if I am the student's instructor and advisor; do I need to submit a Progress Report?**

ANSWER: Yes.

**QUESTION: How do I know what happened after I submitted a concern about a student?**

ANSWER: Cases are opened according to the workflow in Appendix C. If a case is opened Faculty Fellows and Student Success Mentors work the case. When the issue is resolved or the student is deemed unresponsive, the Faculty Fellows and Student Success Mentors will close it. When a case is closed, the person who issued the initial alert is notified via email. The case closed reason and the closed case note is included, thus closing the loop.