

Navigate360: Academic Advisor Onboarding

Checklist for onboarding a brand-new Academic Advisor in Navigate360

Steps	Process	Completed By	
<input type="checkbox"/>	Obtaining Access	No special form needed for Navigate360; Academic Advisors will obtain access when completing all University onboarding processes.	Advisor
<input type="checkbox"/>	Schedule Advising & Navigate360 Training	Email Jennie Scott(scottjm1@etsu.edu) to set up new Academic Advisor training. Jennie will coordinate with Rachel to align Navigate360 Training days.	Advisor & Advising Lead / OEDAA
<input type="checkbox"/>	Training (Introduction)	The training introduction will include the following topics (3 hours): <ul style="list-style-type: none"> • <i>Syncing Calendar</i> • <i>Scheduling (Staff vs. Student)</i> • <i>PAL Links</i> • <i>Staff vs. Student Profiles</i> • <i>Availabilities</i> • <i>Managing Appointments</i> • <i>Profile Customization</i> • <i>Managing Assignments</i> • Navigate360 website 	Advisor/ OEDAA
<input type="checkbox"/>	Training (Session 2)	The training session will include the following topics (2 hours): <ul style="list-style-type: none"> • <i>Notes,</i> • <i>Appointment Summaries (Scheduled vs. Ad-hoc)</i> • <i>To-Dos</i> • <i>Awareness: Journeys and Appointment Feedback Surveys</i> 	Advisor/ OEDAA
<input type="checkbox"/>	Training (Session 3)	The training session will include the following topics (3 hours): <ul style="list-style-type: none"> • <i>Coordinated Care</i> • <i>Referrals</i> • <i>Cases</i> • <i>Academic Alerts</i> • Academic Alerts website • <i>Early Outreach</i> • <i>ESPRs</i> • <i>Re-Enrollment</i> 	Advisor/ OEDAA
<input type="checkbox"/>	Training (Session 4)	The training session will include the following topics (3 hours): <ul style="list-style-type: none"> • <i>Lists</i> • <i>Advanced Search (Saved Searches)</i> • <i>Content Templates</i> 	Advisor/ OEDAA

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		<ul style="list-style-type: none"> • <i>Campaigns</i> (Appointment & Messaging, revisit centralized campaign availability) • <i>Orientation Campaigns</i> 	
<input type="checkbox"/>	Training (Session 5)	<p>The training session will include the following topic (3 hours):</p> <ul style="list-style-type: none"> • <i>V3 Reporting</i> • <i>Dashboards</i> 	Advisor/OEDAA
<input type="checkbox"/>	Confirm Student Meeting Date	Advisor creates <i>Availability</i> to start the date their Advising Lead indicates to begin meeting with students.	Advisor
<input type="checkbox"/>	Caseload Assignments	Make <i>Manual</i> and/or <i>Auto Assignments</i> in Navigate360 and update the Advisor Major and/or Minor Search Tool.	OEDAA
	Extra Permissions	Add <i>Advisor – Outreach Initiatives</i> role	OEDAA
<input type="checkbox"/>	Staff Team	Add Advisor to college’s <i>Staff Team</i> in Navigate360.	OEDAA