

Navigate360: Existing Campus Partner Onboarding

Checklist for onboarding a new Campus Partner in Navigate360

| Steps | Process | Completed By | |
|--------------------------|--------------------------------------|--|------------------------|
| <input type="checkbox"/> | Obtaining Access | If users do not have the Advisor tab in GoldLink, users will need to complete the Banner Student Account Request Form . After receiving Banner access, email Rachel Swatzell (swatzellr@etsu.edu) for specific Navigate360 permissions. | Campus Partner |
| <input type="checkbox"/> | Schedule Navigate360 Training | For existing Navigate360 Care Units, new staff members will need to email Rachel Swatzell (swatzellr@etsu.edu) to scheduling training. | Campus Partner |
| <input type="checkbox"/> | Training | <p>Depending on a unit's configurations and utilized features, training times can vary. Training topics include:</p> <ul style="list-style-type: none"> • <i>Syncing Calendar, Scheduling (Staff vs. Student), Staff vs. Student Profiles, Availabilities, Managing Appointments, Profile Customization, Managing Assignments, Navigate360 website. (3 hours)</i> • <i>Notes, Appointment Summaries (Scheduled vs. Ad-hoc), To-Dos, & Appointment Feedback Surveys. (2 hours)</i> • <i>Coordinated Care, Referrals, Cases, Academic Alerts, Academic Alerts Website, ESPRs*, & Re-Enrollment*. (3 hours)</i> • <i>Lists, Advanced Search (Saved Searches), Content Templates, Campaigns (Appointment & Messaging). (3 hours)</i> • <i>Events & Journeys. (2 hours)</i> • <i>V3 Reporting & Dashboards. (3 hours)</i> | Campus Partner / OEDAA |
| <input type="checkbox"/> | Confirm Student Meeting Date | User creates <i>Availability</i> to start the date they are ready to meet with students. | Campus Partner |
| <input type="checkbox"/> | Caseload Assignments | Make <i>Manual</i> and/or <i>Auto Assignments</i> in Navigate360. | OEDAA |
| <input type="checkbox"/> | Staff Team | Add user to <i>Staff Team</i> if applicable to user's unit. | OEDAA |