

Navigate360: New Campus Partner Onboarding

Checklist for onboarding a new Campus Partner in Navigate360

Steps	Process	Completed By
<input type="checkbox"/>	<p>Obtaining Access</p> <p>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.</p>	Campus Partner
<input type="checkbox"/>	<p>Schedule Navigate360 Demo</p> <p>For users interested in utilizing Navigate360 who do not have department configurations, please email Rachel Swatzell (swatzellr@etsu.edu) to schedule a demo.</p>	Campus Partner
	<p>Build Configurations & Schedule Training</p> <p>After discussing configurations during a department’s demo, Rachel will need time to configure the system and test.</p> <p>After testing is complete, Rachel will schedule training.</p>	OEDAA
<input type="checkbox"/>	<p>Training</p> <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"/>	<p>Confirm Student Meeting Date</p> <p>User creates <i>Availability</i> to start the date they are ready to meet with students.</p>	Campus Partner
<input type="checkbox"/>	<p>Caseload Assignments</p> <p>Make <i>Manual</i> and/or <i>Auto Assignments</i> in Navigate360. Will Rachel need to work with ITS to bring in new <i>Categories</i>?</p>	OEDAA
<input type="checkbox"/>	<p>Staff Team</p> <p>Add user to <i>Staff Team</i> if applicable to user’s unit.</p>	OEDAA