Office of the Provost

Pathways Training Documentation

For Advisors

Pathways Team
4-25-2023

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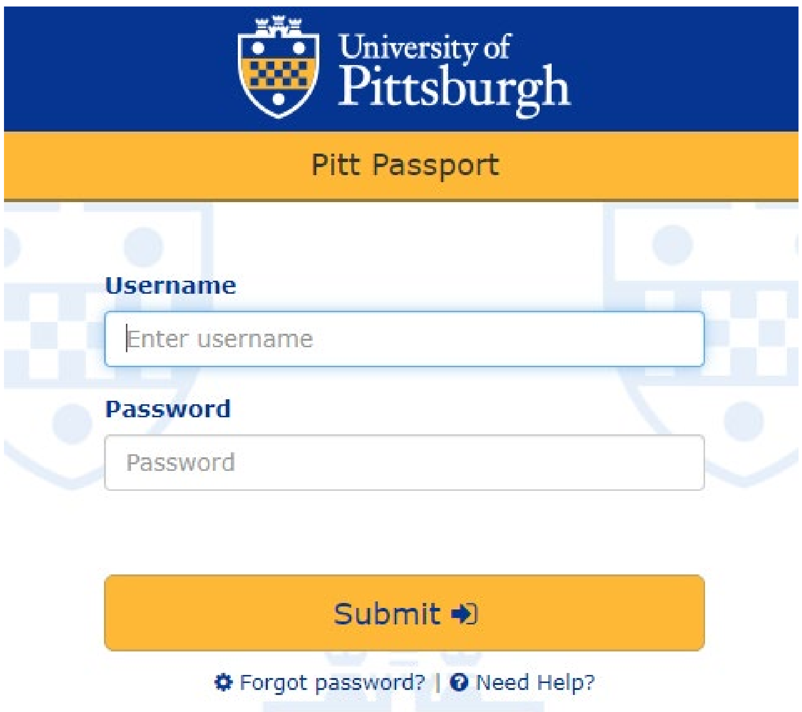
How to Log Into Navigate

1. Find the "Advise Students" resource on my.pitt.edu. This is the live site, so use this site for setting up availability, completing notes and reports, and messaging students.

2. Chrome works best. If you have trouble access either site, please contact PathwaysHelp@pitt.edu for assistance.

3. Once you click the link, you will be directed to Pitt Passport to log in. Use your Pitt Passport credentials to log in.

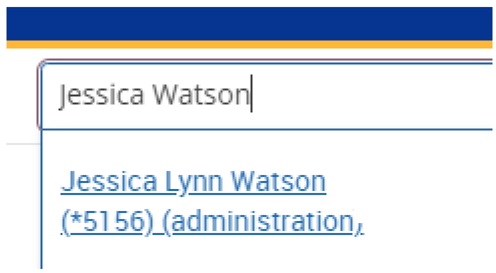


If you are having problems logging in with Pitt Passport please contact CSSD's Help Desk at 4-HELP or helpdesk@pitt.edu for assistance.

How to Search for a Student

1. To search for a student, simply click on the “Quick Search” box in the center of the screen

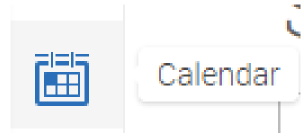
2. Type in the name of a student and select the student to view their home page.



How to Sync Your Calendar

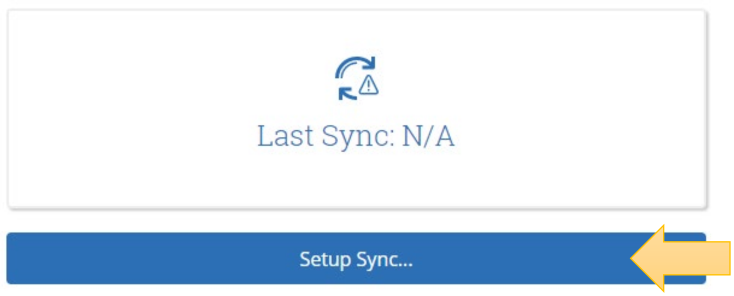
SYNC YOUR CALENDAR ONLY IN THE PRODUCTION SITE

1. Click on the Calendar icon on the left hand side of the screen.

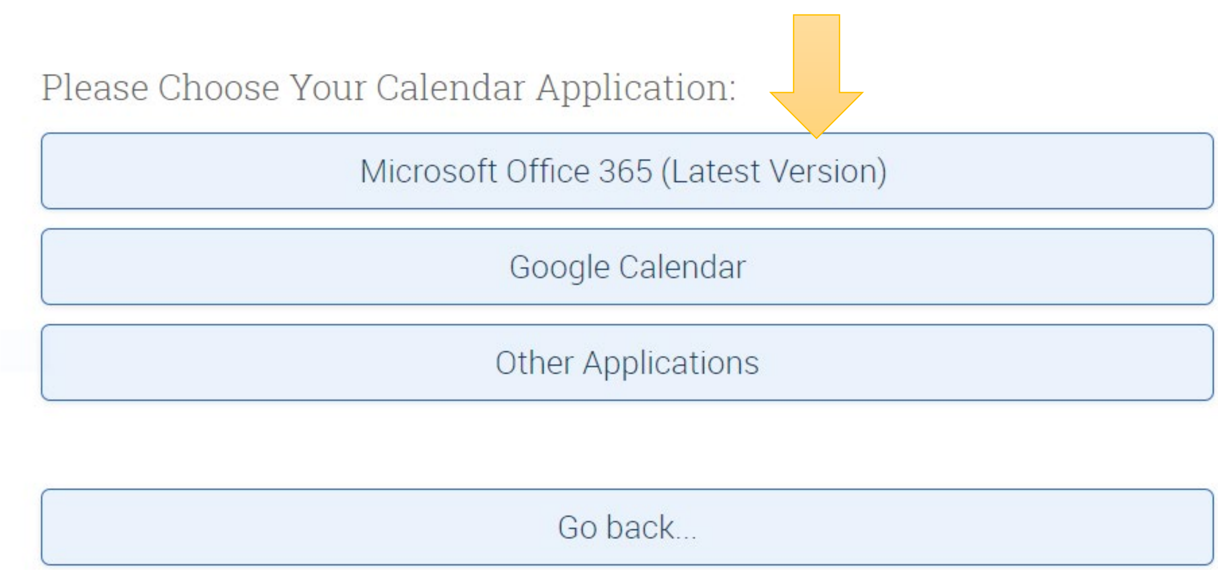


2. On the right hand side of the screen, click on the Settings and Sync button.

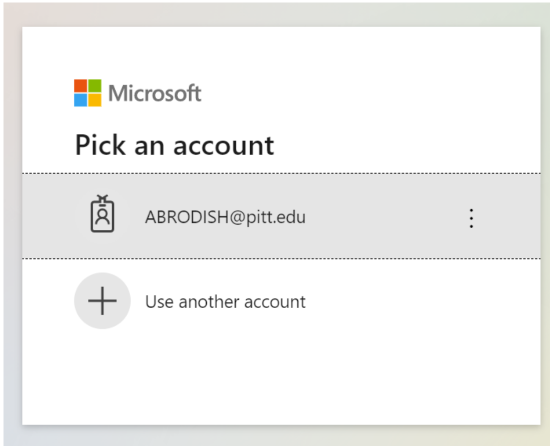
3. On the next screen, click on the Setup Sync button.



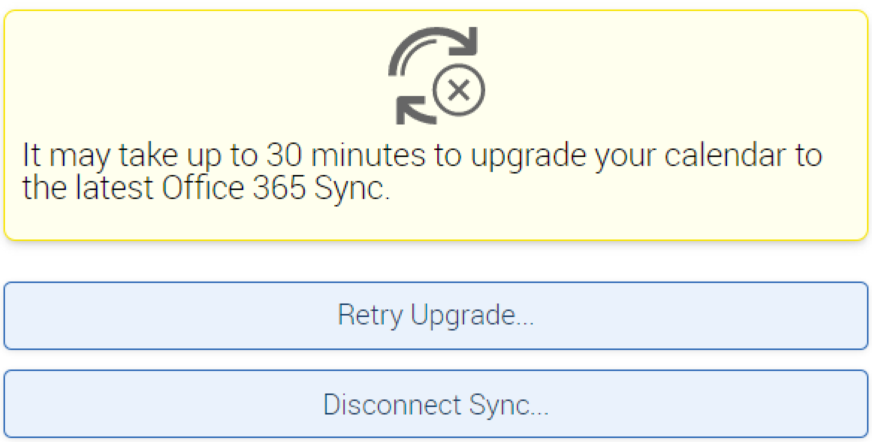
4. You will be prompted to select your Calendar Application. Click the Outlook Service Accounts button. This is the only ways your calendar will sync correctly.



5. Then choose your account.



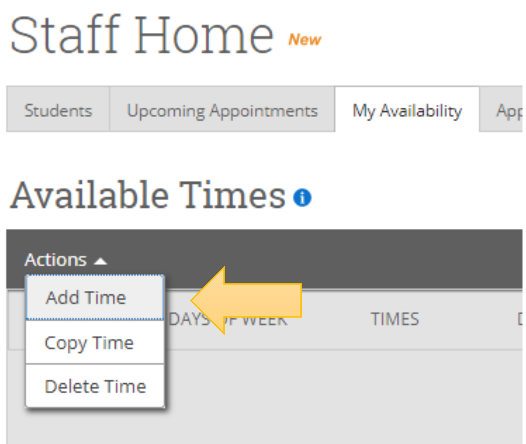
6. After signing in, you will see a yellow banner at the bottom right of the screen indicating that sync was successful and you'll see the screen below.



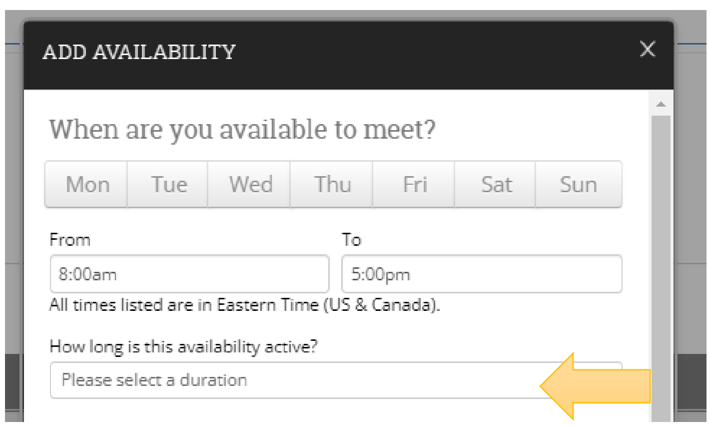
How to Set Your Availability in Navigate

Set up your availability in Navigate so that students can schedule appointments to see you. It's important to note that locations and services are created by university administrators.

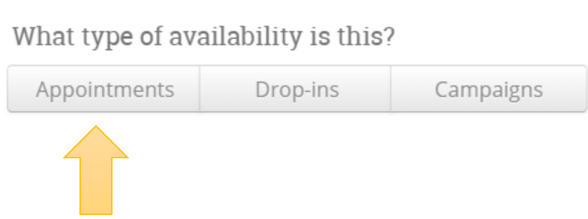
1. Click on the My Availability tab. Under Available Times,
   Go to the Actions menu and select Add Time



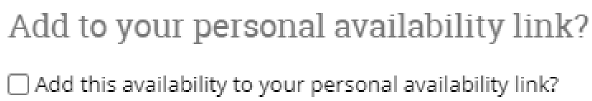
2. Select the days and times when you are available to meet with students. Determine how long the availability is active: for a term, a range of dates, or forever.

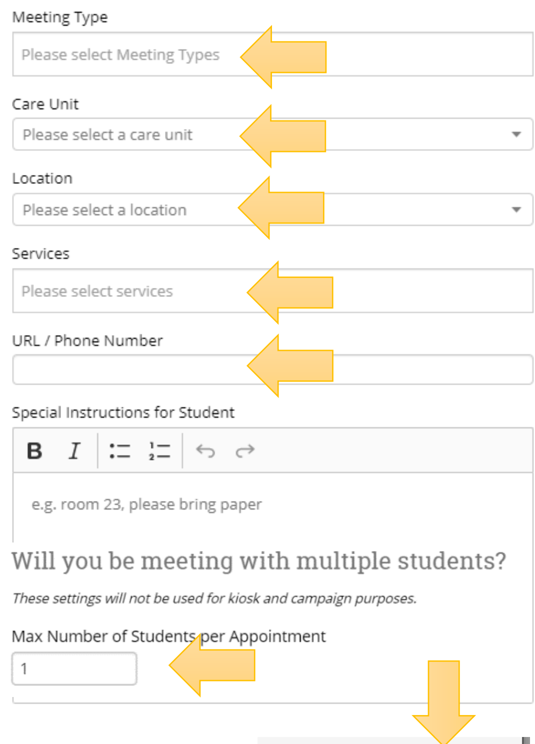


3. Select the type of availability. Selecting appointments will allow students to schedule appointments with you via your personal availability link or on the app.

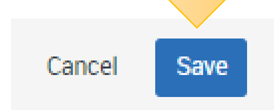


4. Determine if you want to have this availability associated with your Personal Availability Link. If yes, click on the box. If no, leave it unchecked.





5. Select the type of meeting (in person v. virtual) that you want to make yourself available for.
6. Choose the care unit from the drop-down menu: Care Unit.
7. Choose the location where you are available from the drop-down menu: Location.
8. Select which type of appointment(s) for which you are available in Services: Service.
9. If it applies, you can add a URL or phone number for virtual appointments.
10. Add any special instructions for student.
11. Select the number of students per appointment.
12. Click the Save button.



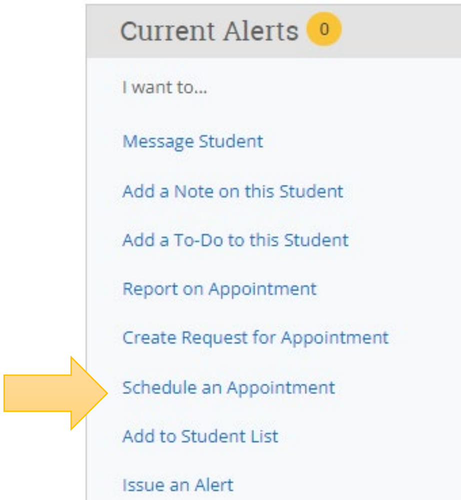
13. Repeat this process until all of your availabilities have been defined. You can have as much availability as you need!

Tip: *Use the Special Instructions to Students box to include personalized information such as office number and/or directions. E.g.,*

If you chose an "In-Person" appointment:
Appointments will take place [your office number].

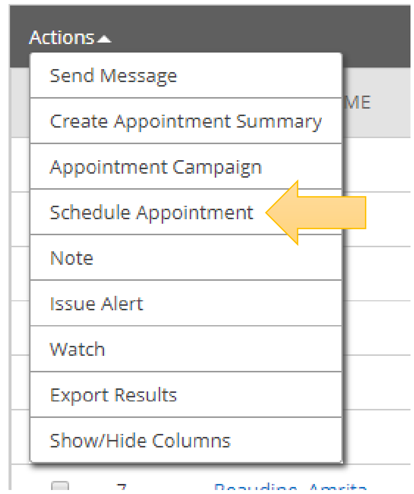
If you chose an "Virtual" appointment:
Please make sure you are on a computer and are logged into my.pitt.edu. Please use my Zoom room link: [your Zoom room].

How to Schedule an Appointment

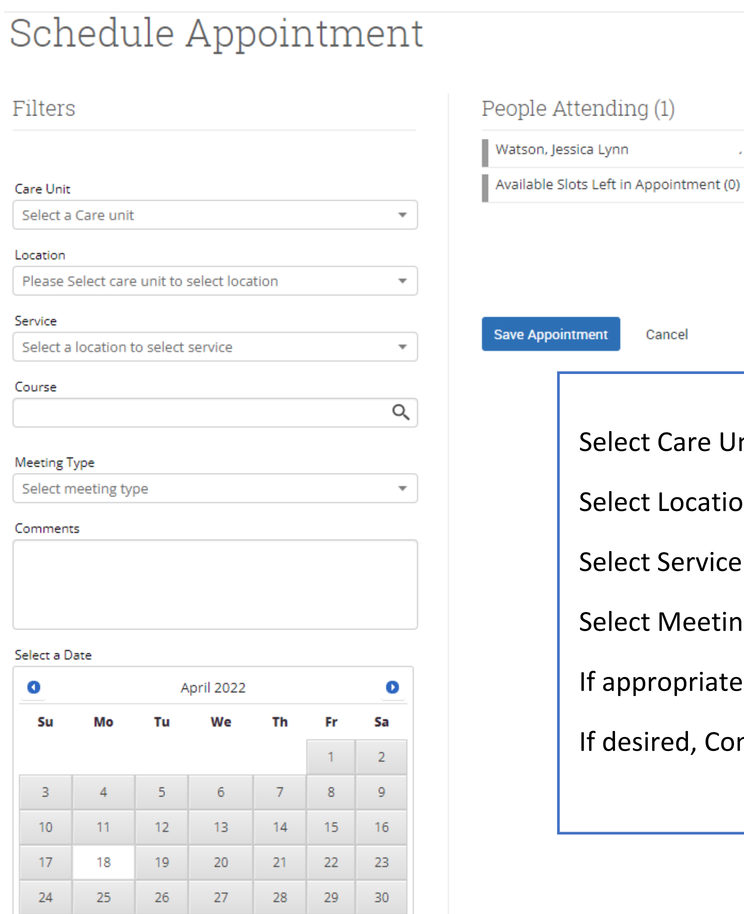


1. If you have students assigned to you, check the box of the student you want to make an appointment with and select Schedule Appointment.

2. If you don't have students assigned to you, use the Schedule an Appointment link from the student's page. The process below is the same.



3.



Select Care Unit: <u>Care Unit</u>

Select Location: <u>Location</u>

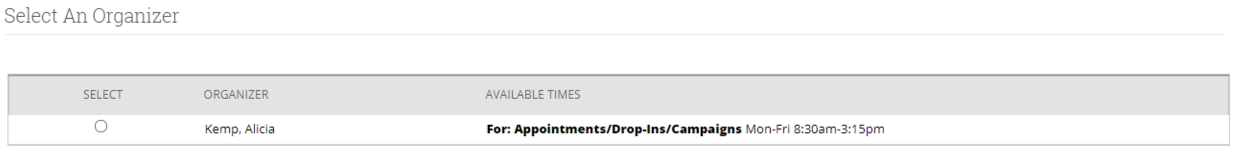
Select Service: <u>Service</u>

Select Meeting Type: <u>In-person v. virtual</u>

If appropriate, select the Course if needed

If desired, Comments could be added

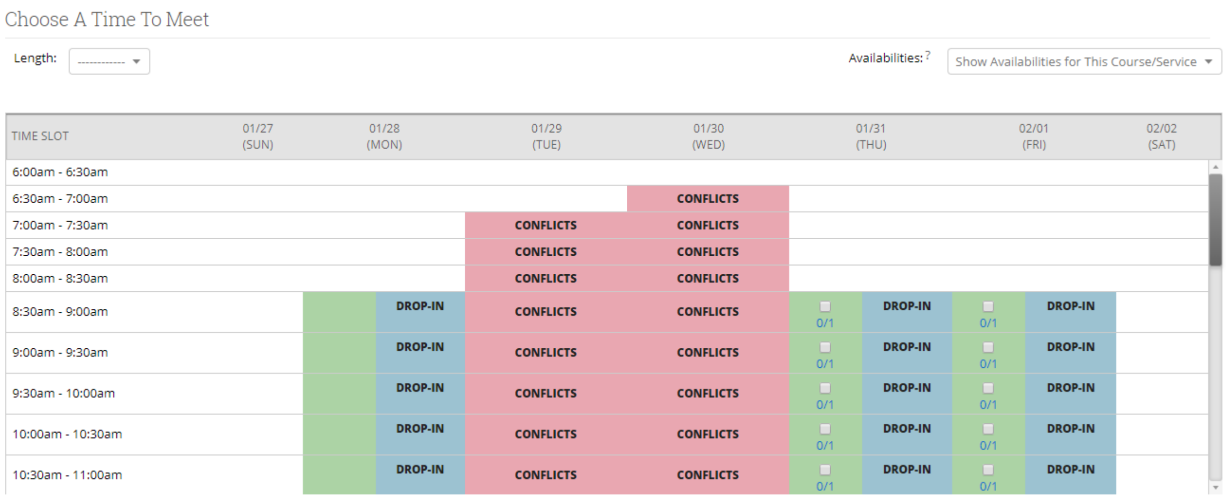
4. Click the radial button next to your name as the organizer.



Select An Organizer

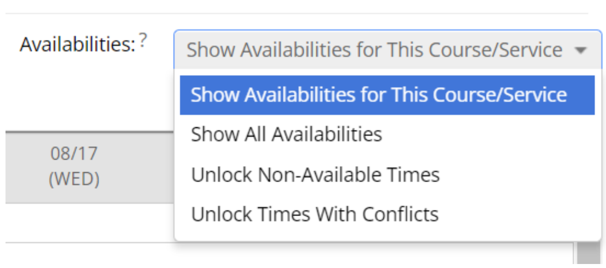
SELECT	ORGANIZER	AVAILABLE TIMES
○	Kemp, Alicia	**For: Appointments/Drop-Ins/Campaigns** Mon-Fri 8:30am-3:15pm

5. After an organizer is selected, a scheduler will appear that has both the availability of the advisor and any conflicts with the student's schedule.
6. Choose a length of time for the appointment.
7. If an appointment is available, that appointment will display with a small green box that will need to be checked to select it.



TIME SLOT	01/27 (SUN)	01/28 (MON)	01/29 (TUE)	01/30 (WED)	01/31 (THU)	02/01 (FRI)	02/02 (SAT)
6:00am - 6:30am							
6:30am - 7:00am				CONFLICTS			
7:00am - 7:30am			CONFLICTS	CONFLICTS			
7:30am - 8:00am			CONFLICTS	CONFLICTS			
8:00am - 8:30am			CONFLICTS	CONFLICTS			
8:30am - 9:00am		DROP-IN	CONFLICTS	CONFLICTS	0/1 DROP-IN	0/1 DROP-IN	
9:00am - 9:30am		DROP-IN	CONFLICTS	CONFLICTS	0/1 DROP-IN	0/1 DROP-IN	
9:30am - 10:00am		DROP-IN	CONFLICTS	CONFLICTS	0/1 DROP-IN	0/1 DROP-IN	
10:00am - 10:30am		DROP-IN	CONFLICTS	CONFLICTS	0/1 DROP-IN	0/1 DROP-IN	
10:30am - 11:00am		DROP-IN	CONFLICTS	CONFLICTS	0/1 DROP-IN	0/1 DROP-IN	

8. If needed, you can toggle the "Availabilities" to unlock additional times for the appointment.

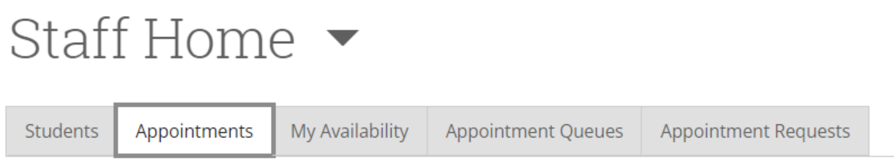


9. Click Save Appointment

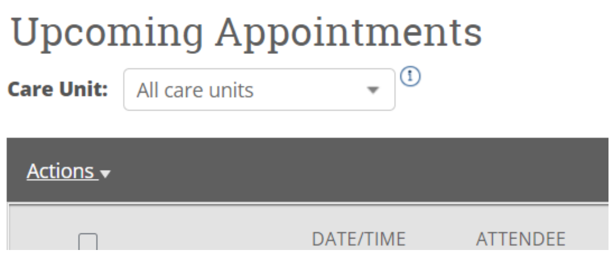
How to Complete an Appointment Summary Report

An Appointment Summary Report works like the notes you take on your advising appointments. It allows you to document advice or next steps that you have given to your student. Appointment Summary Report is used to document interactions *with* a student.

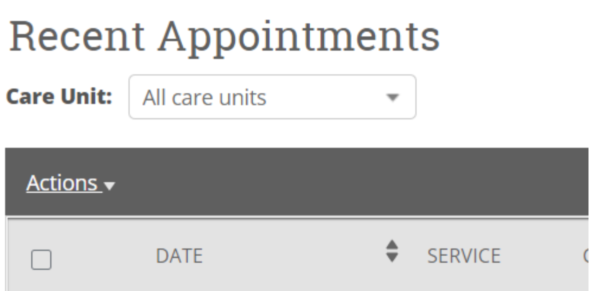
1. From your home screen, select the Appointments tab.



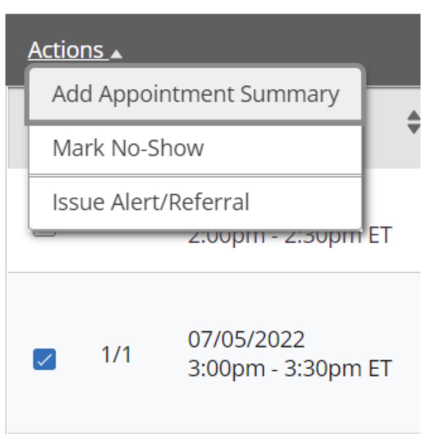
2. For current or upcoming appointments, scroll to the Upcoming Appointments section.



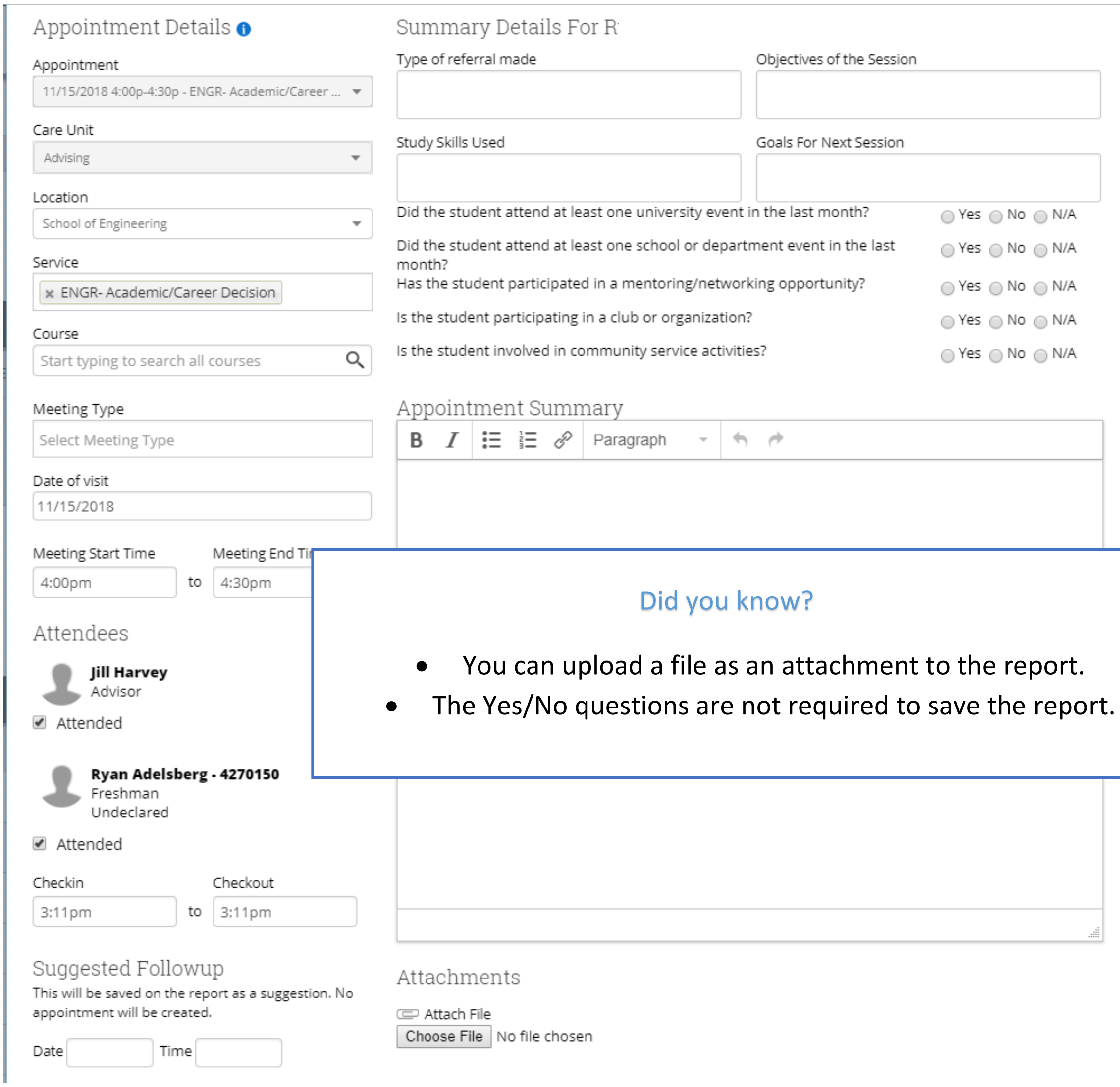
3. For past appointments, scroll to the Recent Appointments section.



4. Select a student for whom you would like to create an Appointment Summary and under actions select "Add Appointment Summary".



5. Fill in the information needed to complete the Summary Report

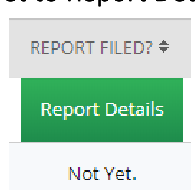


Did you know?

- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

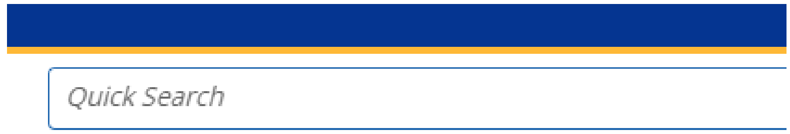
6. Once complete click Save this Report.

7. The Report Filed? column will change from Not Yet to Report Details in the Recent Appointments section.



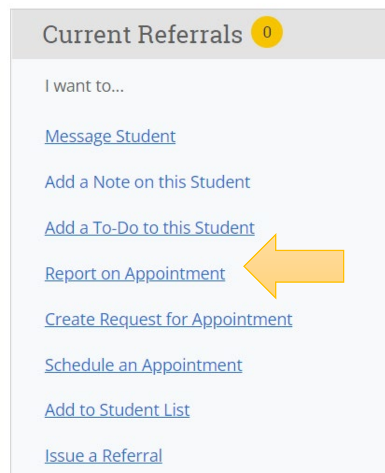
How to Complete an Appointment Summary Report without an Appointment

1. To search for a student, simply click on the “Quick Search” box in the center of the screen

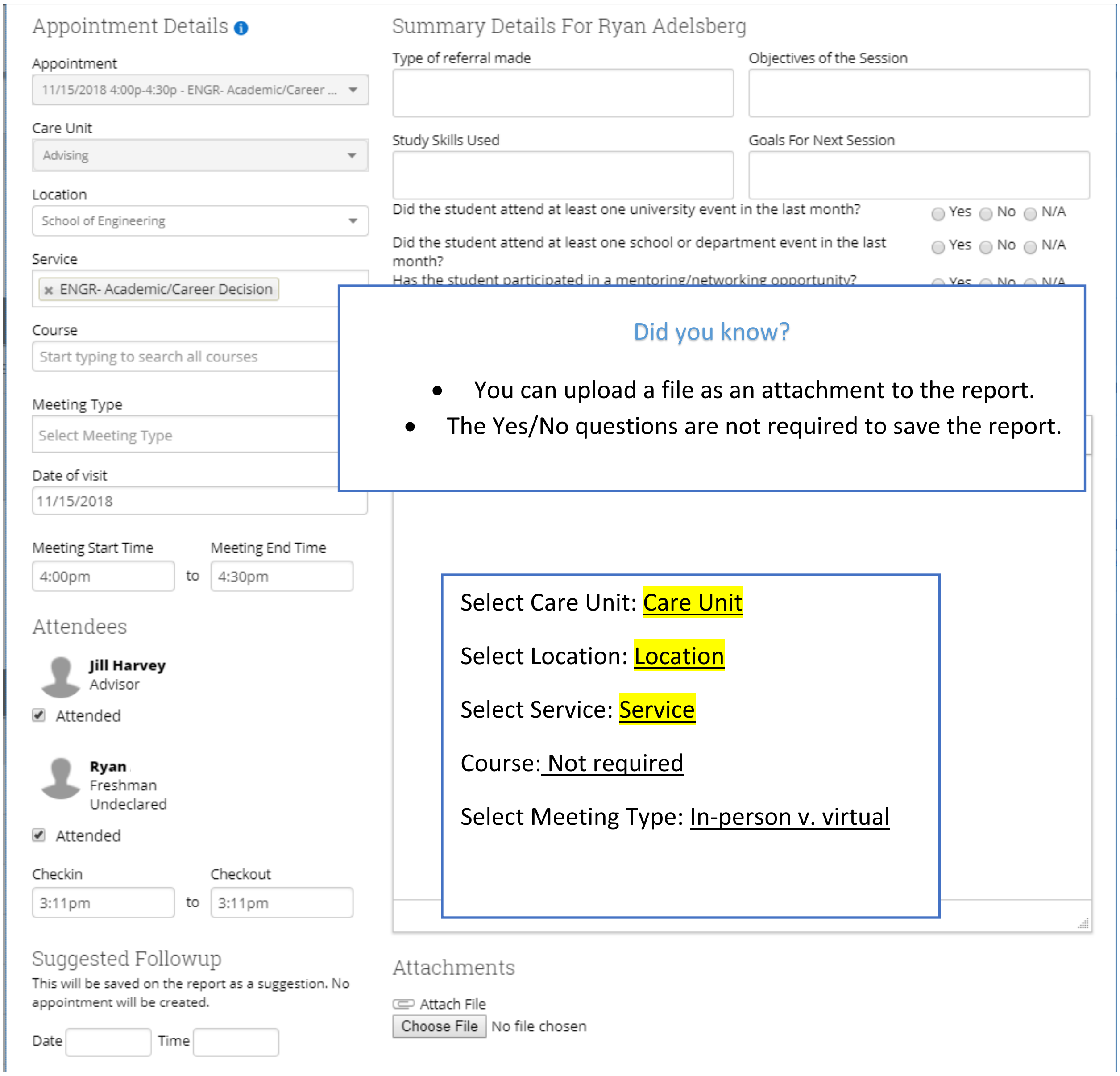


2. Type in the name of a student and select the student to view their home page.

3. Under Actions off to the right, click on the drop down to give you the options and select “Report on Appointment”.



4. Fill in the information needed to complete the Summary Report



Did you know?

- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

Select Care Unit: Care Unit

Select Location: Location

Select Service: Service

Course: Not required

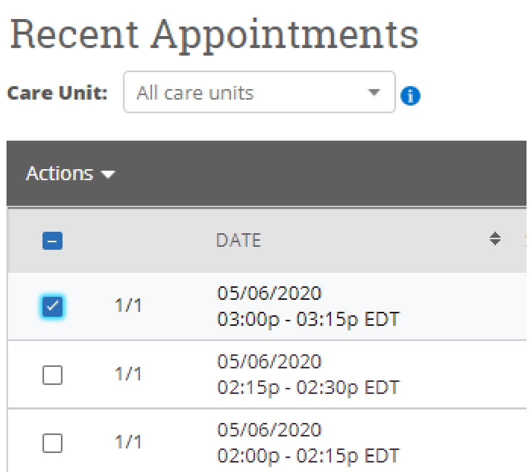
Select Meeting Type: In-person v. virtual

5. Once complete click Save this Report.

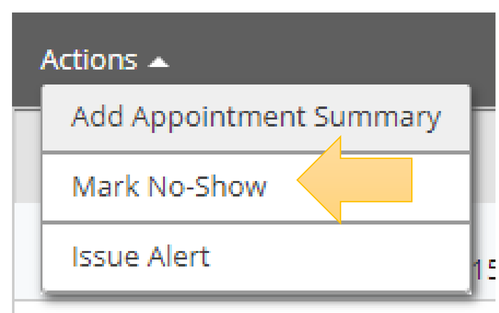
How to Mark an Appointment as a No Show

1. Scroll down to your Recent Appointments

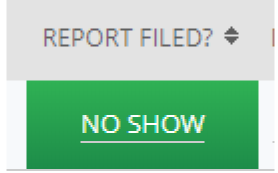
2. Click on the box next to the appointment you want to mark as a No Show.



3. Open Actions button and select Mark No-Show

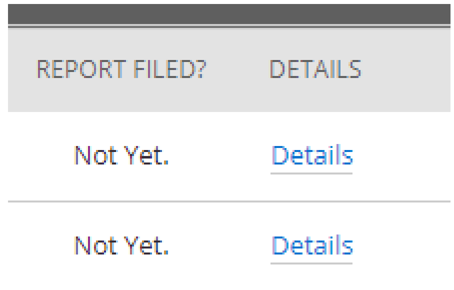


4. An Appointment Summary will open. You can add a note or simply close it. A green No-Show box will show in the Report Filed column

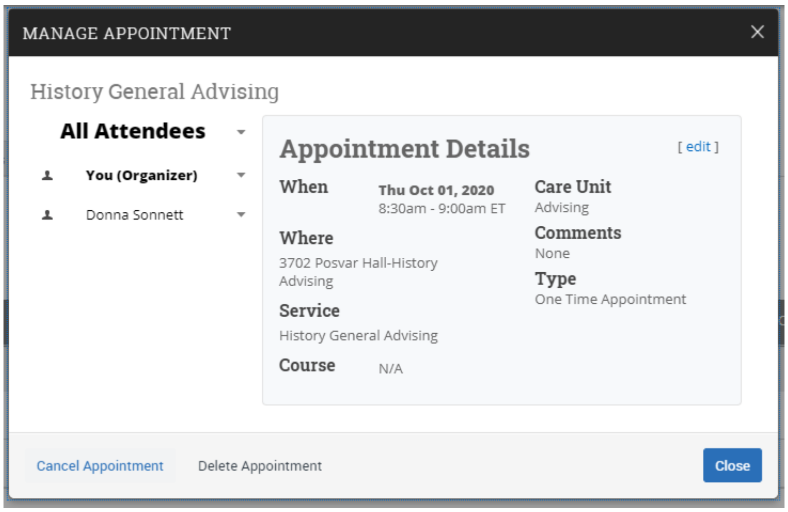


How to Cancel an Appointment

1. From your Upcoming Appointment tab on your Staff Home page, click on the Details link for the appointment you want to cancel.

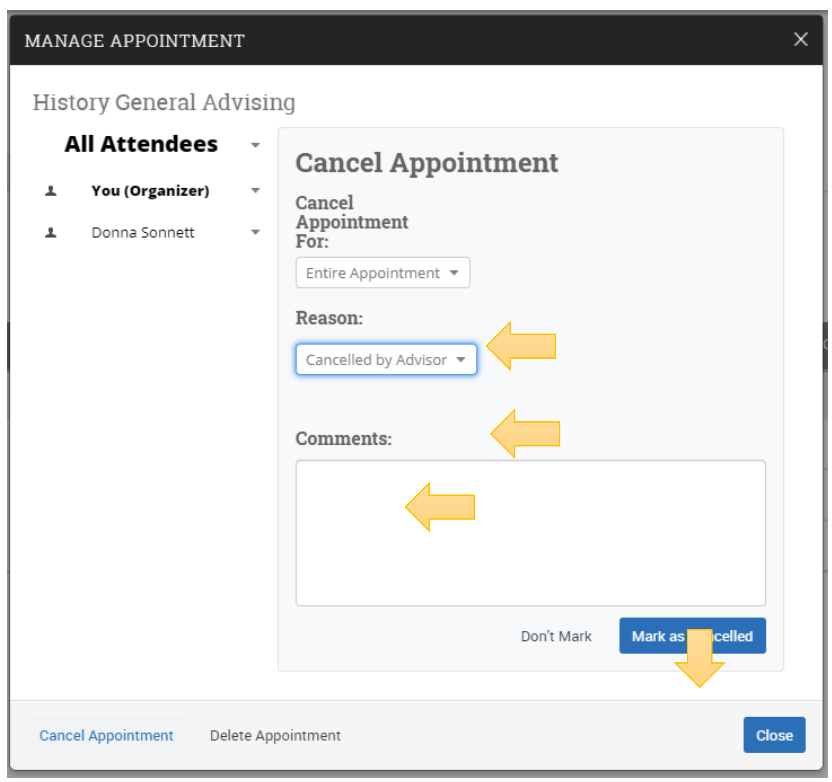


2. This will bring up the appointment details. Click Cancel Appointment in the bottom let. **Do not click** on Delete Appointment.

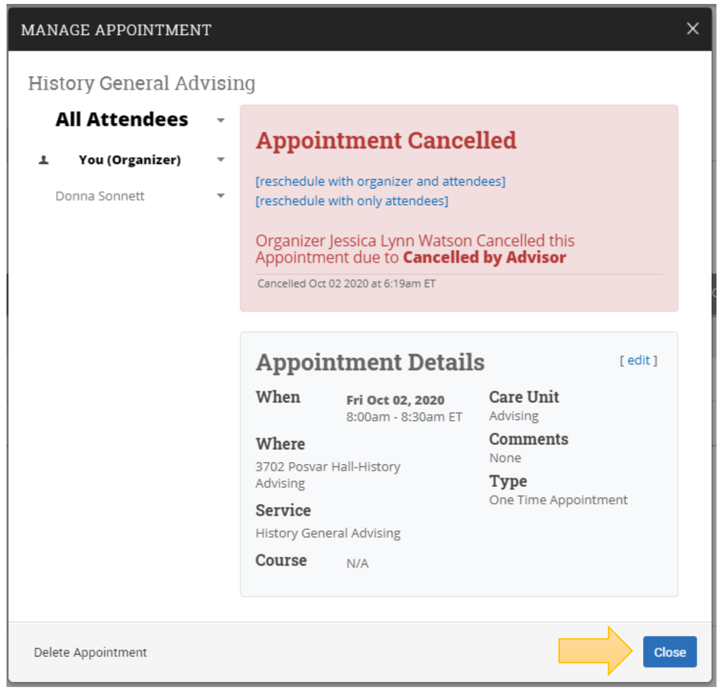


Delete Appointment will erase all data around that appointment and will not show up in any reporting. It is not advised.

3. You will need to mark the entire appointment canceled
4. Select a reason. Most often it will be cancelled by Advisor or student.
5. Any comments left in the box are shared with the student via email. You can use this box to leave instructions on how to schedule a new appointment.
6. Click Mark as Cancelled

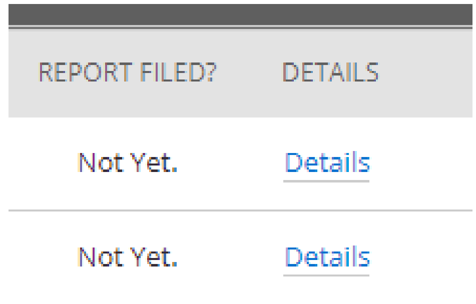


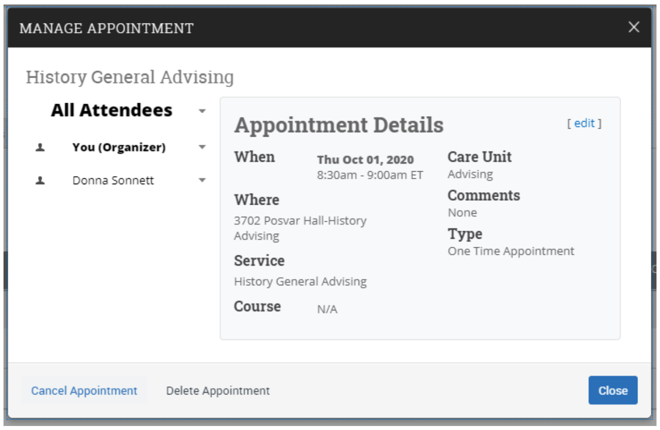
7. You will get confirmation that the appointment was canceled, then click Close.



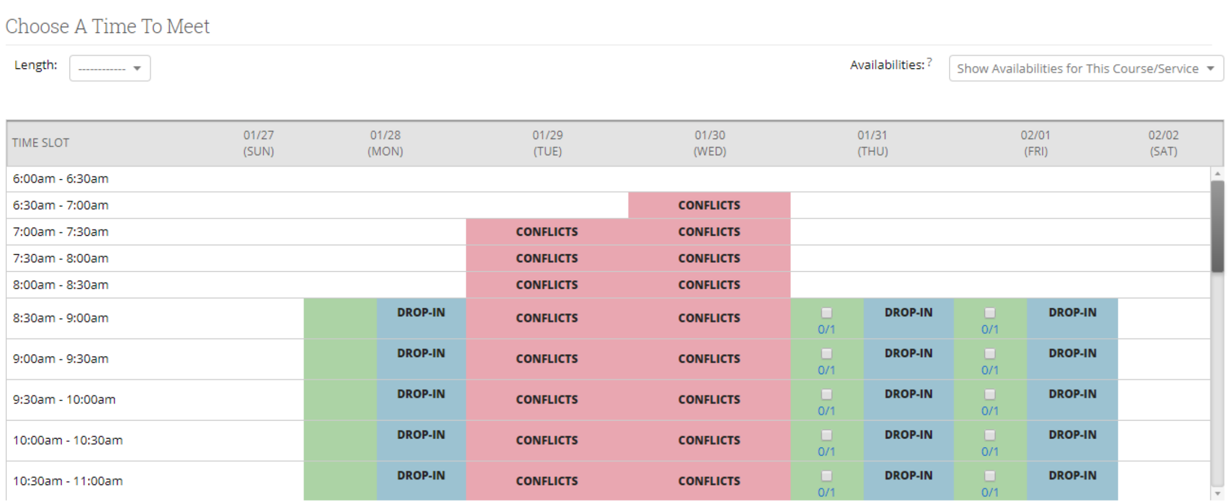
How to Edit an Appointment

1. From your Upcoming Appointment tab on your Staff Home page, click on the Details link for the appointment you want to edit.
2. This will bring up the appointment details. Click the edit button at the top.





4. Make changes to the existing appointment in the scheduler which has both the availability of the advisor and any conflicts with the student's schedule.

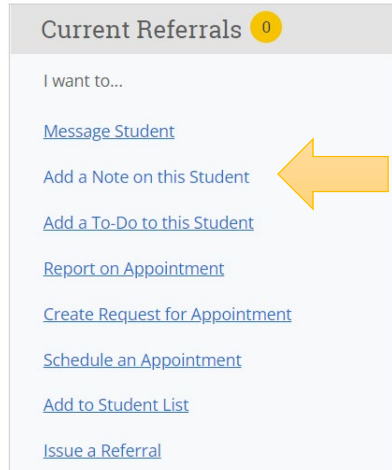


5. Save Appointment and an update will be set to both the advisor and student.

How to Add a Note to a Student's Page

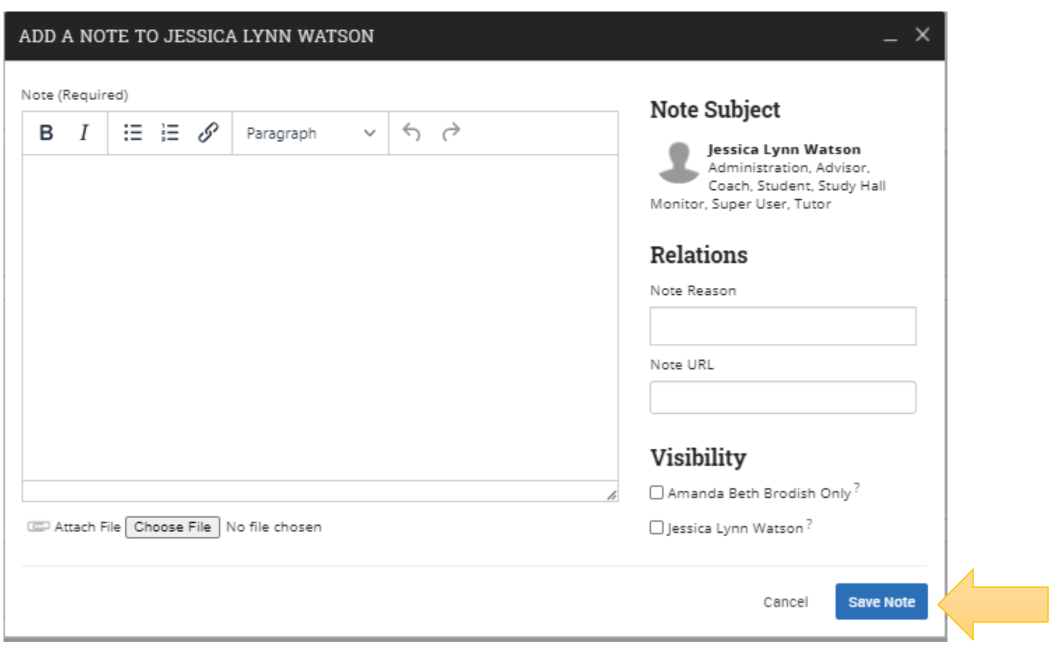
Notes are used to document information *about* a student, whereas Appointment Summary Reports are used to document interactions *with* a student.

1. To add note to a student's page, simply click on "Add a Note on this Student" when you are on the student's page.



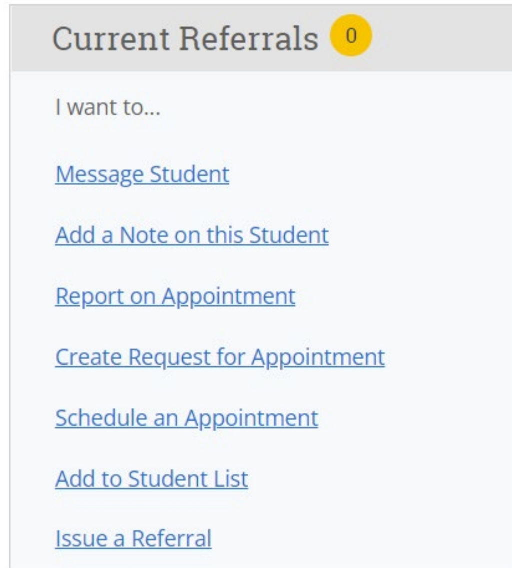
2. Type your note. You can make the note only visible to you. If you don't check that box, everyone can see your note. Regardless of who can view the note, it is still subject to FERPA. Checking the student's name does not mean that the student will get an email about the note. It means that if the student logged into Navigate Student, they would see the note.

3. Click "Save Note"



How to Make a Referral for a Student

Referrals should be used for non-emergency situation only. For more information about referrals, click here.



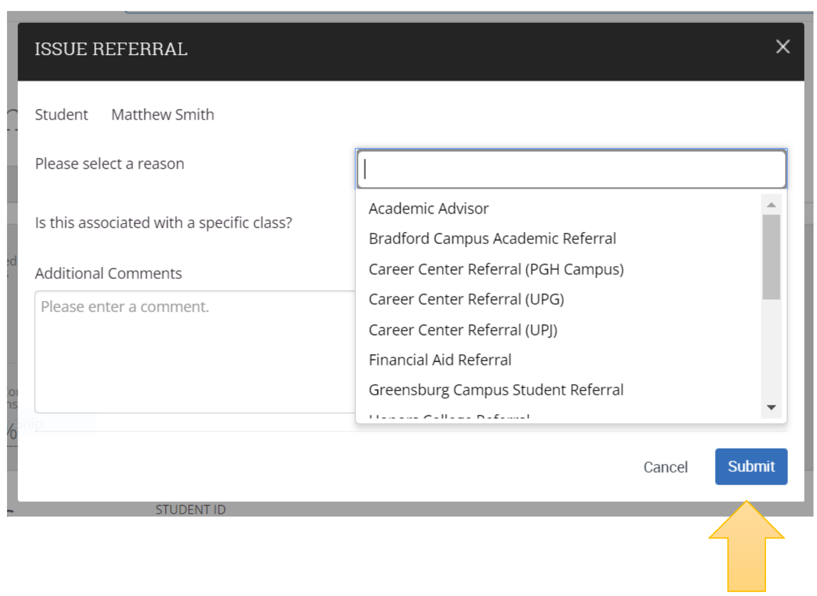
1. From the student's page, click Issue a Referral on the right side of the screen

2. Click the "Please select a reason" drop down and select the referral you would like to make.

3. You can associate the referral with a specific course, if relevant.

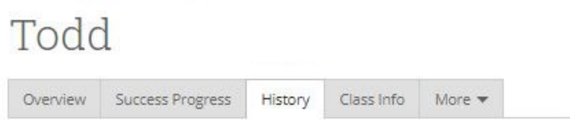
4. Add comments in the "Additional Comments" box to provide contextual information.

5. Click the blue "Submit" button.

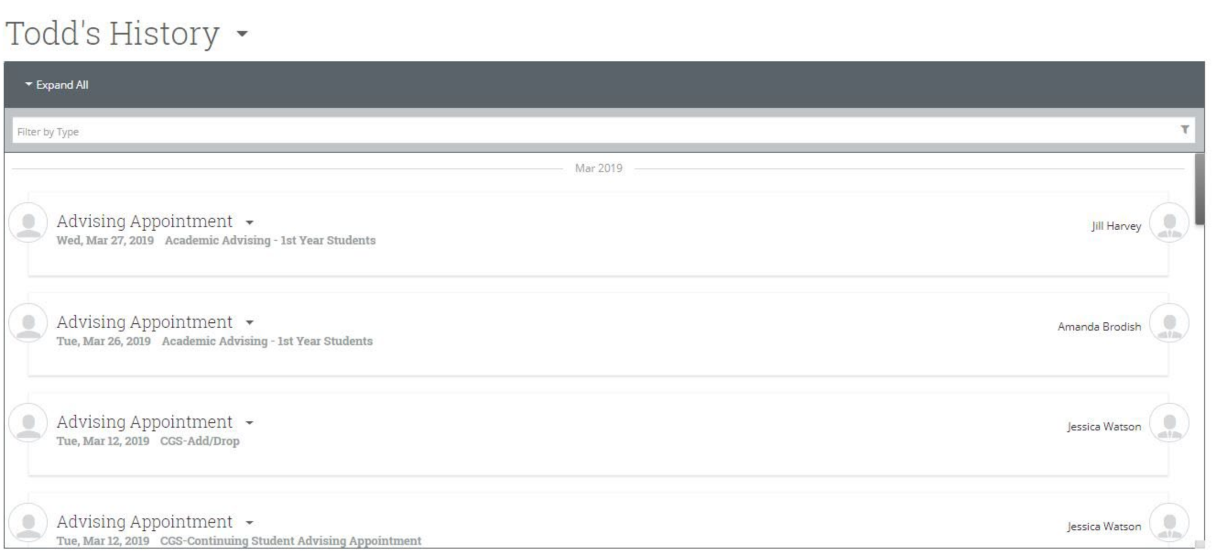


How to View Notes and Appointment Summary Reports

1. To view notes and appointment summary reports, click on the "History" tab on the student's page.



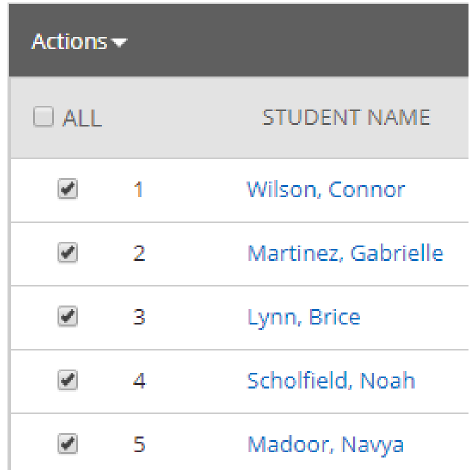
2. Once on the "History" tab, scroll down to the "[Student Name]'s History" section. You will see a chronological list of all appointment summaries and notes left for a particular student, along with the date and name of the advisor who left it. You can click on the down arrow to view the report or note.



How to Create a Student List

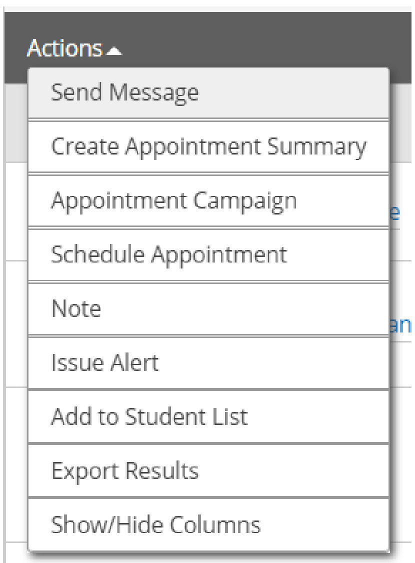
To help keep track of a list of students, you can create a student list. This is a list of students manually created and maintained by a user that highlights a particular population. This list can be used for Advising Campaigns, communications, or other monitoring.

1. Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students or by using the search functionality.

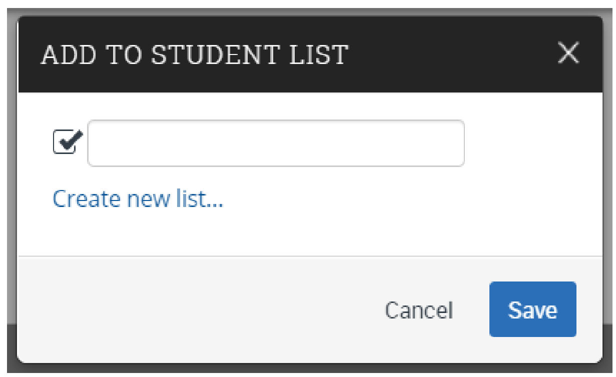


Search Icon

2. Under Actions select Add to Student List

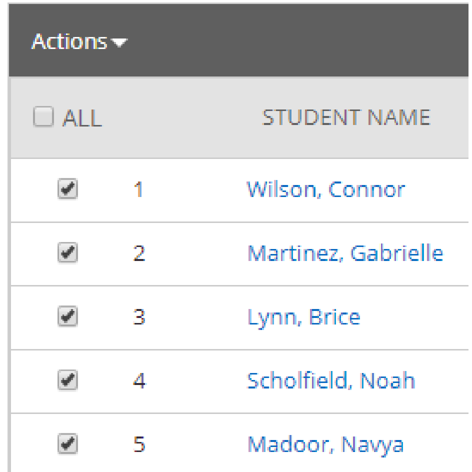


3. Click on Create new list… and give the new student list a name. Click Save.

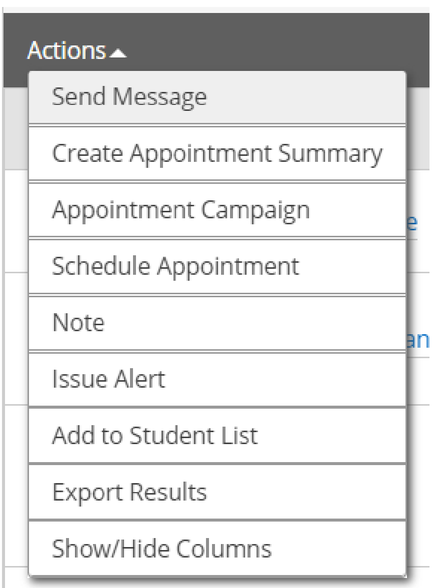


How to Add Students to an Existing Student List

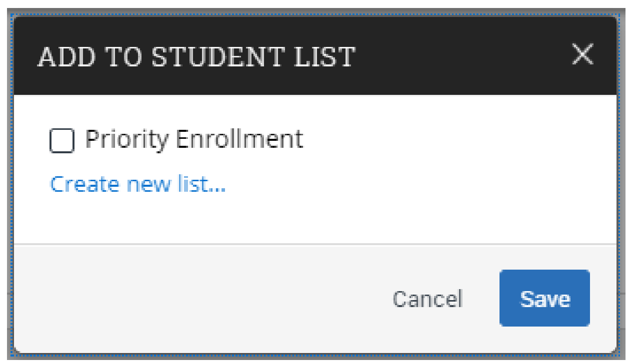
1. Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students, by using the search functionality or even from your list of appointments.



2. Under Actions select Student List.



3. Click on the box next to the Student List you want to assign the student to. Click Save.



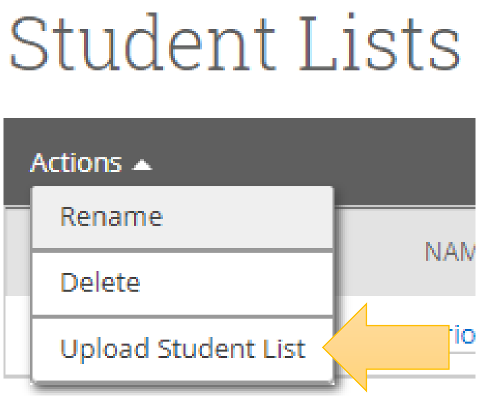
How to Upload a Student List via Batch

Often, you have queries from other systems that would be useful to your work within the Pathways system. Rather than recreate that list within Advanced Search or manually add students to a Student List, you can load students into the system from the list you already have using the Batch feature.

1. Before you start in Pathways, you will need to create a .csv file in Excel. The spreadsheet should be simply a header and a list of PeopleSoft IDs of the students that you want to include in your Student List.

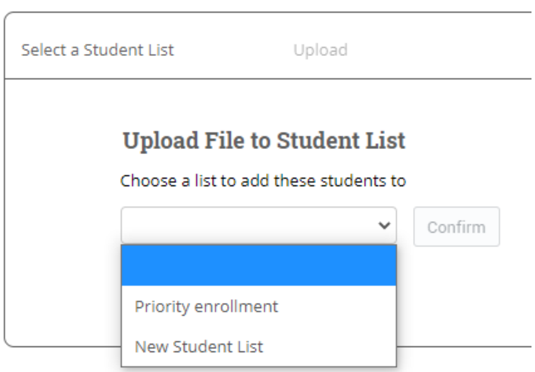
	A	B
1	Students	
2	123456	
3	234567	
4	345678	
5		
6		

2. Click on the List & Searches icon.

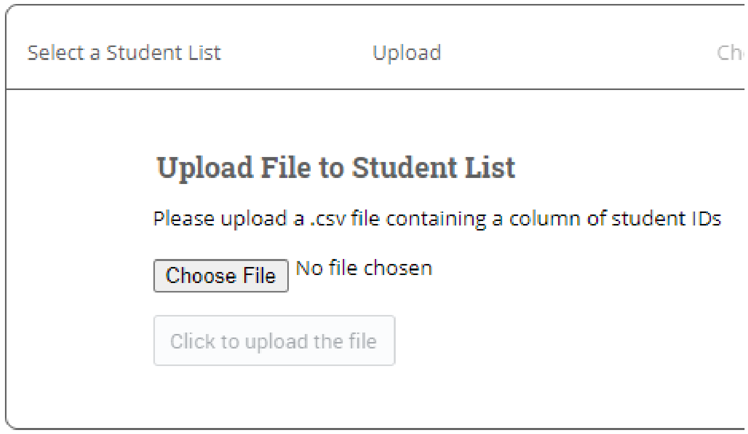


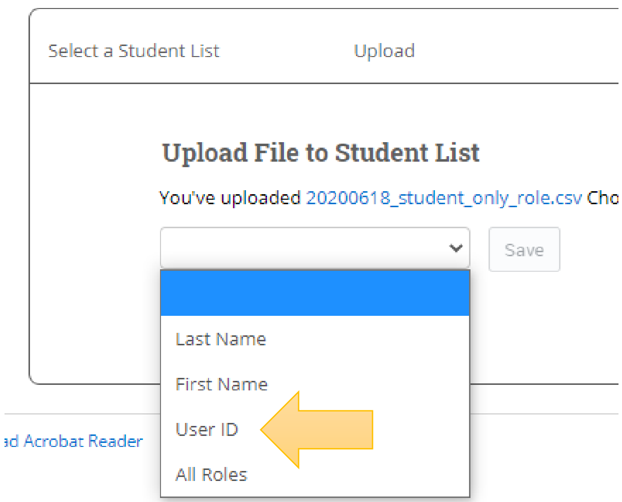
3. Click the Actions drop down and select Upload Student List.

4. To choose a list, click on the little triangle and select the list or create a new student list then click Confirm.



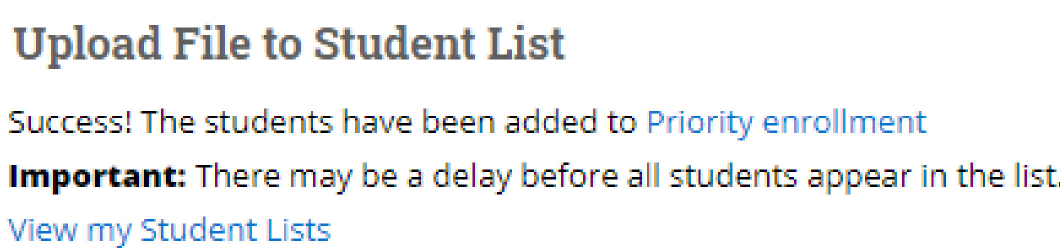
5. Click on the Choose File button to select the file you want to load and click on the Click to upload the file button.





6. Select the header of the column that holds all of your PeopleSoft ID's and click the blue Save button.

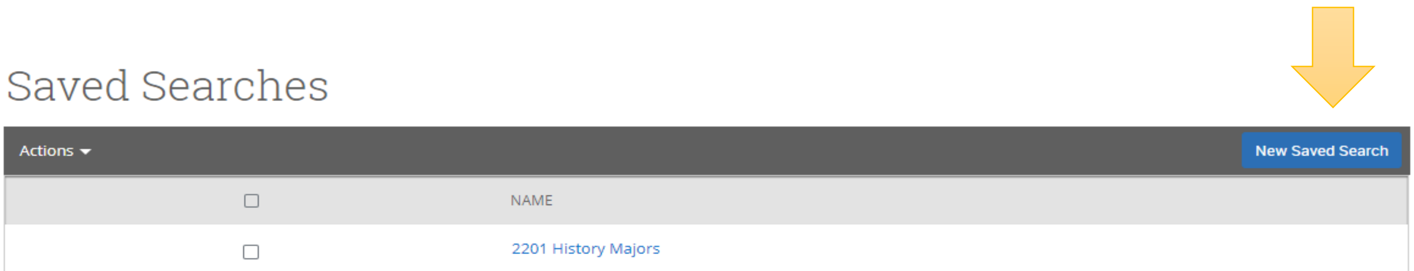
7. Depending on the size of the Student List, it may take a few minutes to load all of the students into the Student List.



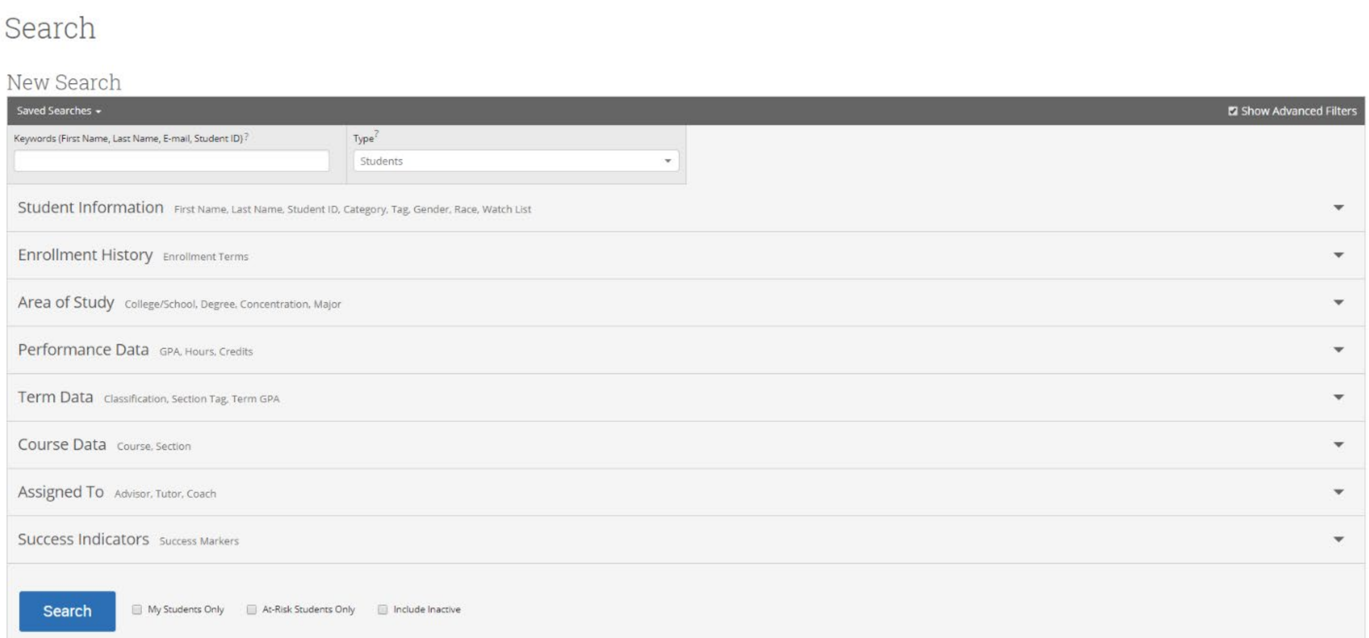
How to Create a Saved Search

1. From your homepage, click on the Lists & Searches Icon

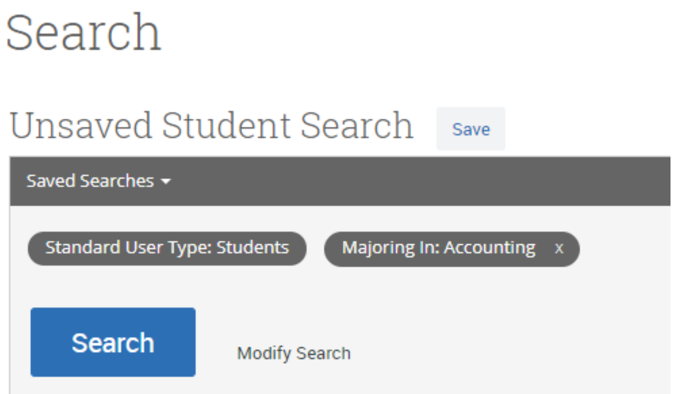
2. Under Saved Searches, click the button New Saved Search



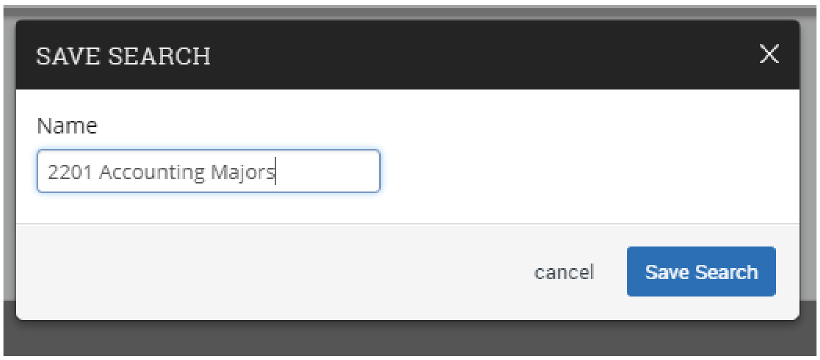
3. Use the search function and filters to select a group of students. Click Search.



4. Once you have your list, click Save at the top of the page.



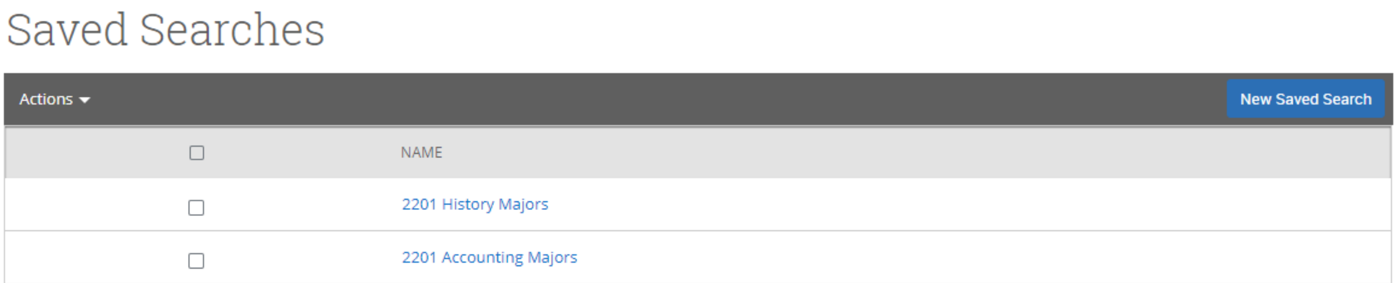
5. Name your list. Click Save Search.



How to Access Your Saved Search

1. From your homepage, click on the Lists & Searches Icon

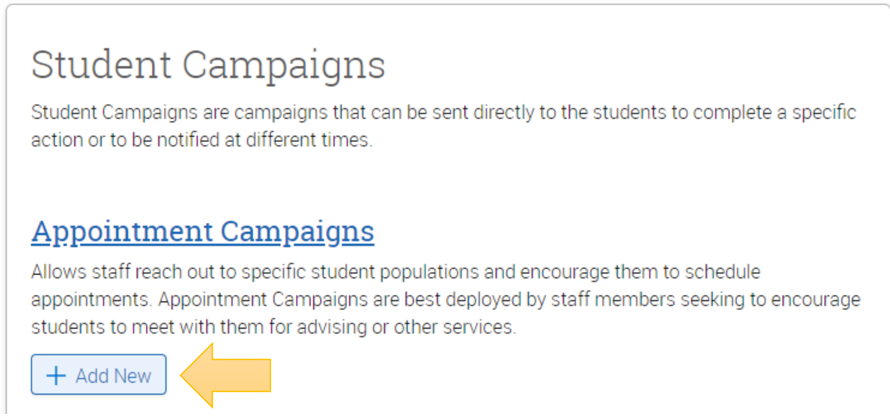
2. Click on the search that you want to run again. The system will rerun the search and return the results.



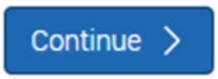
How to Create an Appointment Campaign

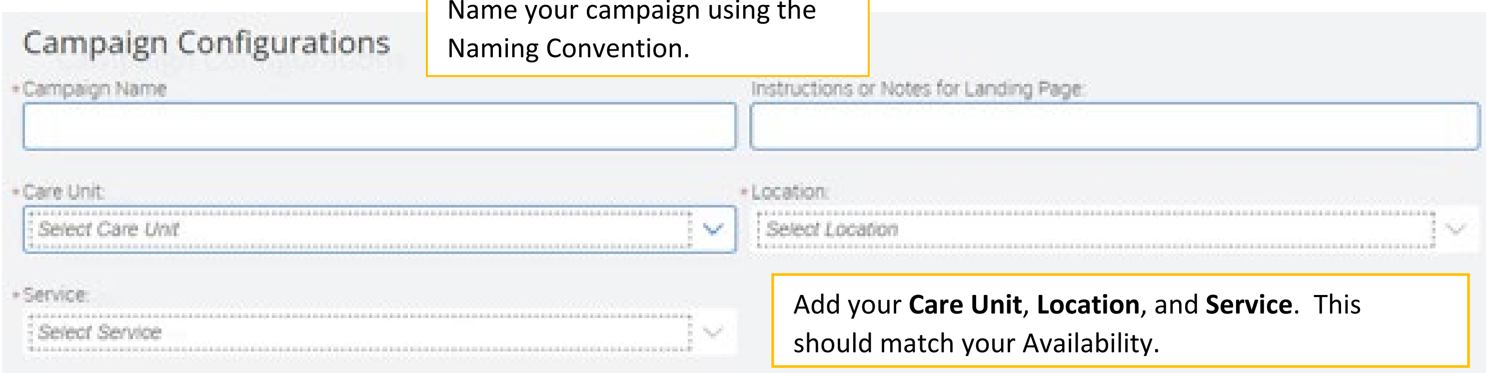
1. Select the Campaigns icon from the Quick Links section on the left of your screen.

2. Click Add New under Appointment Campaigns located in the Student Campaigns box.



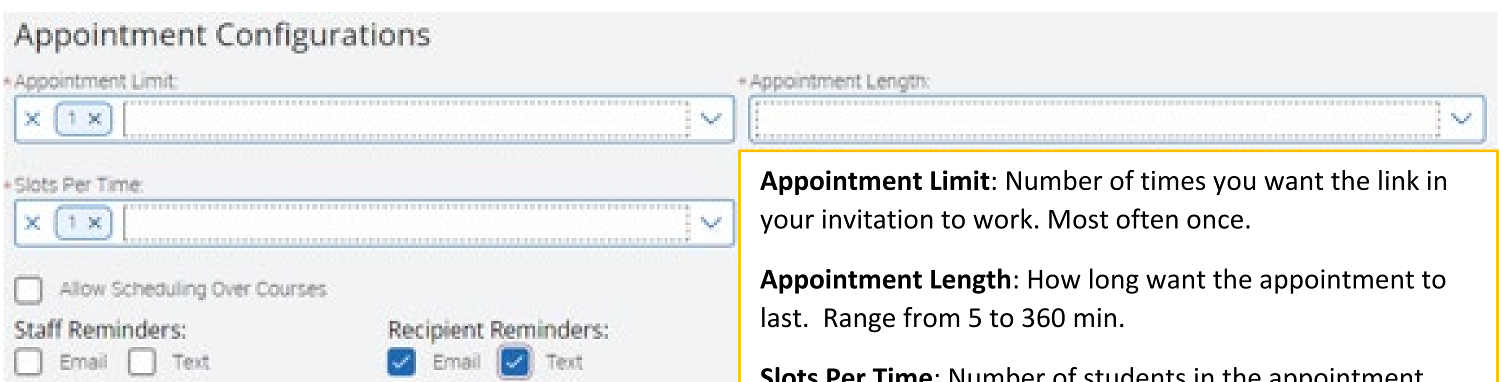
3. Define your campaign. When finished, click Continue.





Name your campaign using the Naming Convention.

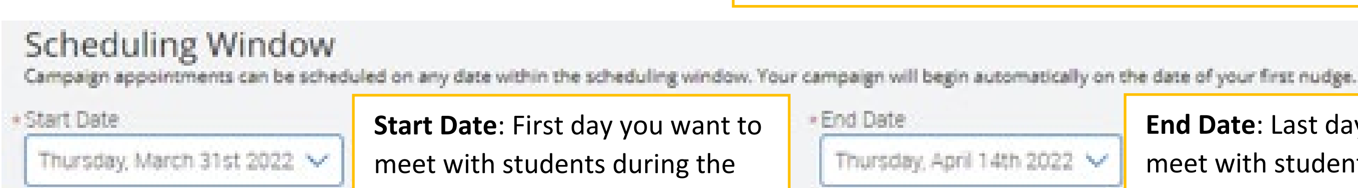
Add your **Care Unit**, **Location**, and **Service**. This should match your Availability.



Appointment Limit: Number of times you want the link in your invitation to work. Most often once.

Appointment Length: How long want the appointment to last. Range from 5 to 360 min.

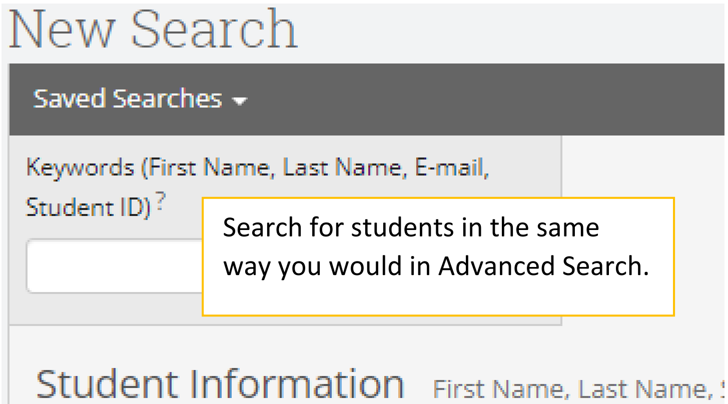
Slots Per Time: Number of students in the appointment.



Start Date: First day you want to meet with students during the campaign.

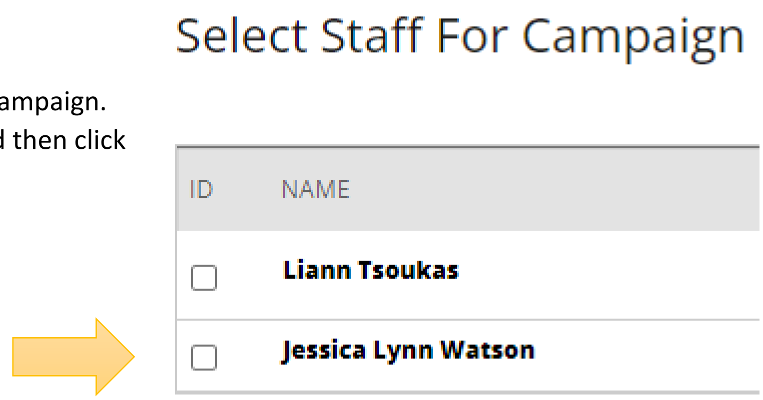
End Date: Last day you want to meet with students during the campaign.

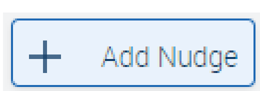
4. Find students to add to the Campaign by searching them and clicking Search.



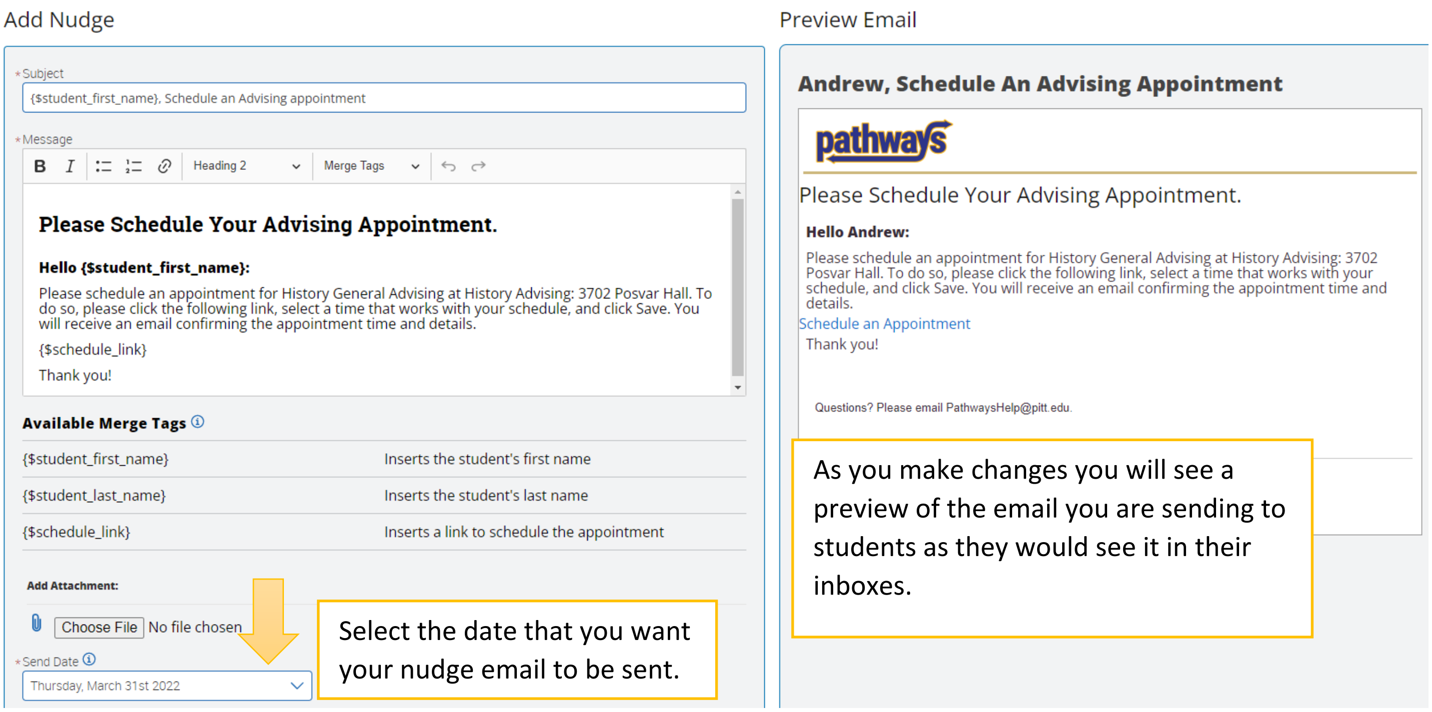
5. Select the students that you want to include in the Campaign by clicking on the box next to the name of the student individually OR click the box next to Name at the top of the list to select everyone at once. Then click Continue.

6. You will need to add Staff to your Campaign. Click the box next to your name and then click Continue.





7. Now you compose your email message or Nudge. To do this, click the Add Nudge button.



8. Make edits to the email that you want to send to students. Make sure that the {$schedule_link} tag stays intact. This is how a student can make an appointment with you. Click Save Nudge.

9. Using Nudges, you can resend email reminder messages to the students who have not yet made an appointment with you. You can add as many Nudges as you want when you set up your Campaign, and they will be sent out on the day you choose. Once you have set up all of your nudges, click Continue.

You can send email reminders in advance for students who have not made an appointment with you using multiple Nudges. You decide the date that you want a new reminder to go out. Just follow the steps above to create as many reminders as you need. Now, you won't have to remember to check!

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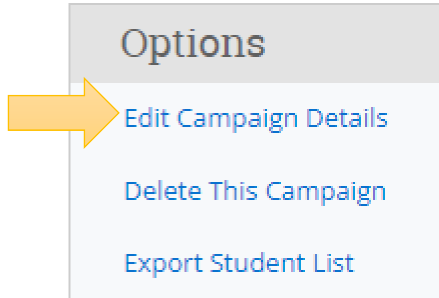
10. Confirm your Appointment Campaign and click Start Campaign.

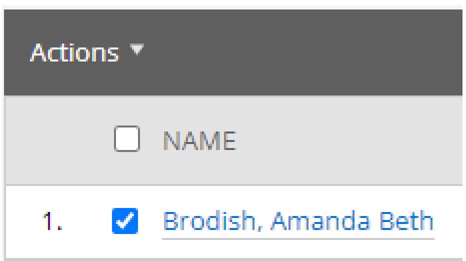
How to Add a Student to an Existing Campaign

1. Click the Campaign icon  on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details



3. Select Verify Recipients at the top of the screen.



4. Click Add More Recipients and find the student you want to add. Click the box next to the student before clicking continue

5. Once you have added the students, click on Verify and Start to get to the last screen.

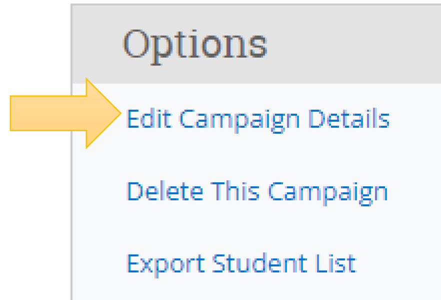
6. At the bottom of the screen, click Save and Exit.

7. An email will be sent to the new students in your campaign in the next Nudge.

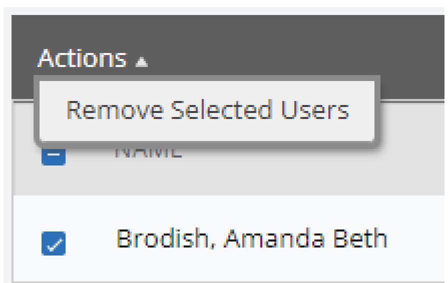
How to Remove a Student from a Campaign

1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details

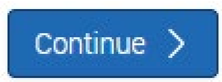


3. Select Verify Recipients at the top of the screen.



4. Click on the box in front of the student you want to remove. Under Actions, select Remove Selected Users.

5. Once your list refreshed, click Continue



6. Once you have removed the students, click on Verify and Start to get to the last screen.

8. Click Save and Exit to save your changes.

Frequently Used Terms and Definitions

EAB: Name of the company that produced the software

Navigate: The name EAB gave to the Advisor software. Formerly Campus.

Navigate Student: The name EAB gave to the student facing app

Pathways: The name Pitt gave to the platform

Appointment Campaigns: The act of reaching out to a targeted student population using Pathways

Student List: A list manually created and maintained by a user that highlights a particular population (e.g. all of your seniors or all of your students with a GPA within a certain range

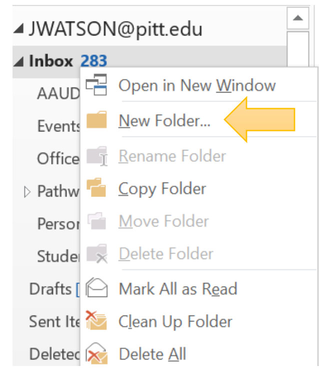
Location: Where advising or tutoring appointments occur

Service: Type of appointment

Alert: The name EAB gave to referrals

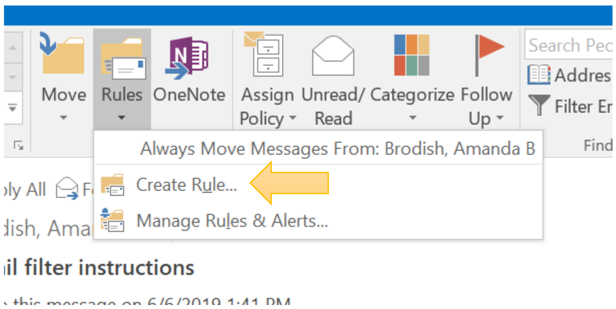
Case: Process of how a user manages referrals in Pathways

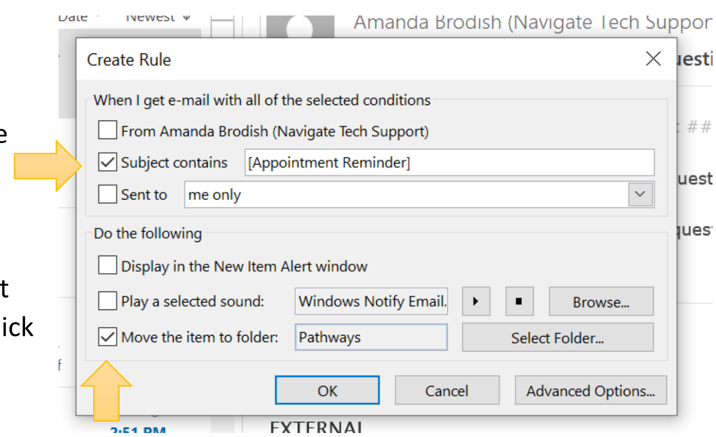
How to Create a Rule in Outlook for Appointment Reminder Emails



1. Right click on your inbox in Outlook to create a new folder to hold your Appointment Reminders

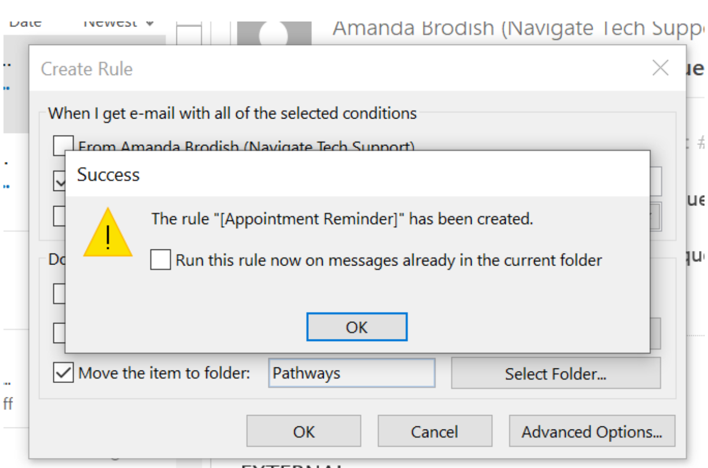
2. Highlight a message you would like to be included in the folder. Go to "Rules" and click "Create Rule".





3. You will see this message box. Check the **Subject contains** box. Delete the rest of the text from the Subject of the email leaving just [Appointment Reminder].

4. Check the **Move the item to folder** box and select the folder that you created to hold the emails. Click Ok.



5. Clicking the box **Run this rule now on messages already in the current folder**, will pull all emails currently in your Outlook that fit this rule and place them in this folder. It is up to you if you wish to do this. Then click OK .