Office of the Provost

Pathways Training Documentation

All Users

Pathways Team
4-25-2023

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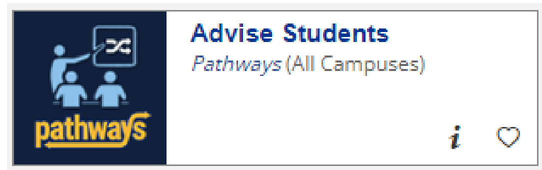
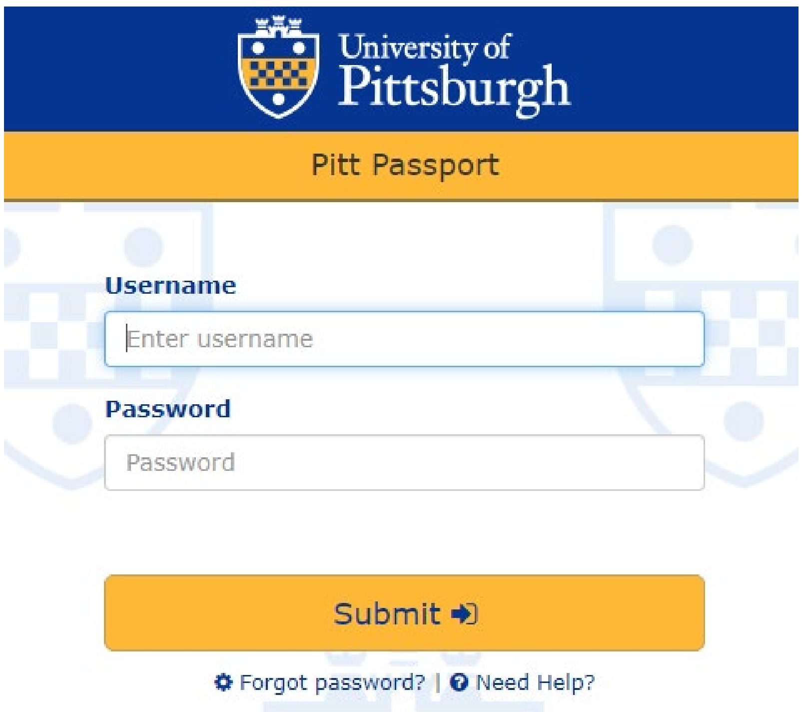
How to Log Into Navigate

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.

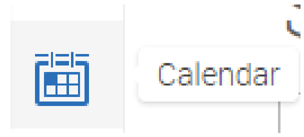


If you are having problems logging in with Pitt Passport please contact CSSD's Help Desk at 4-HELP or helpdesk@pitt.edu for assistance.

How to Sync Your Calendar

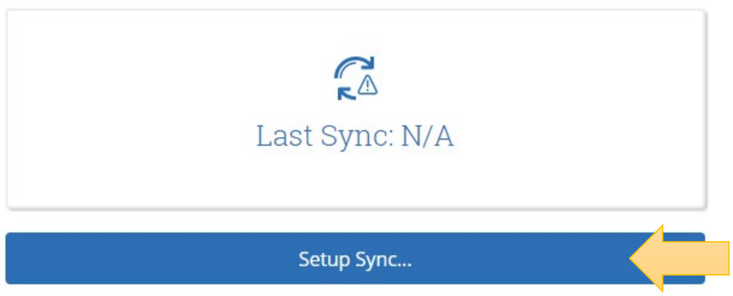
SYNC YOUR CALENDAR ONLY IN THE PRODUCTION SITE

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

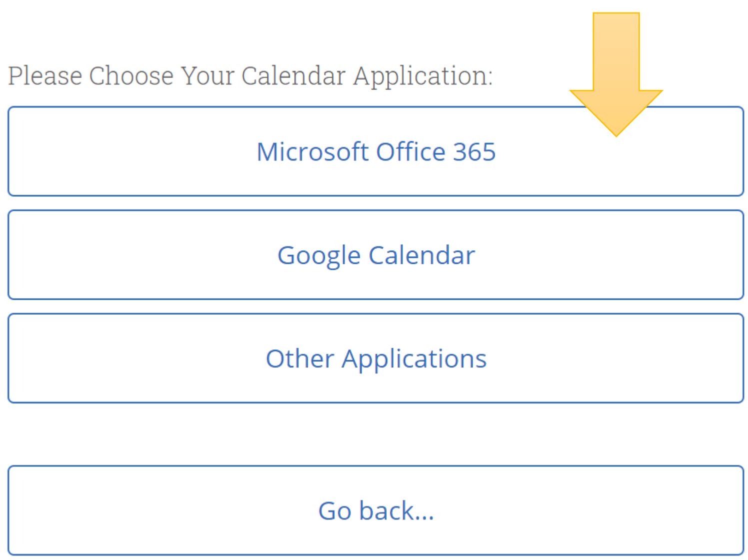


2. On the right hand side of the screen, click on the Settings and Sync button.

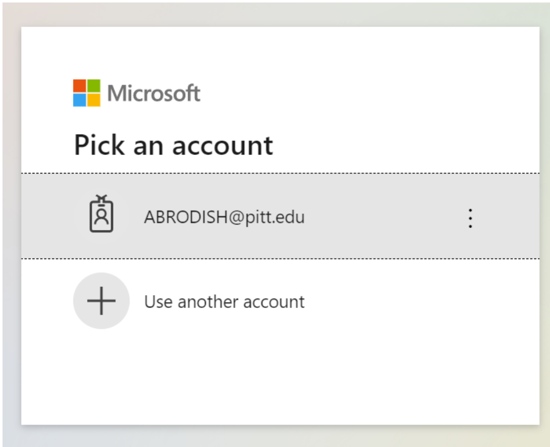
3. On the next screen, click on the Setup Sync button.



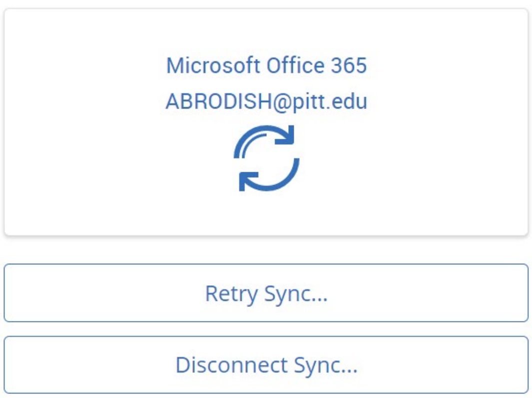
4. You will be prompted to select your Calendar Application. Click the Microsoft Outlook 365 button. This is the only ways your calendar will sync correctly.



5. Then choose your account.



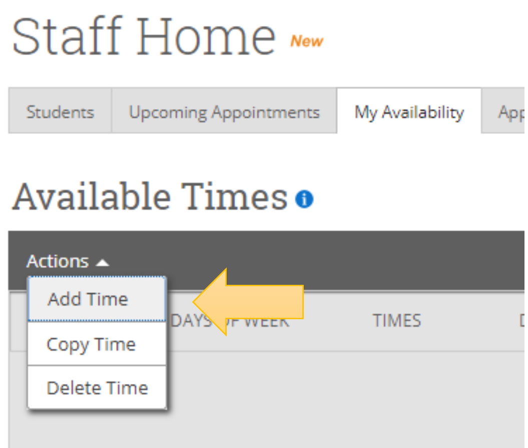
6. After signing in, you will see a yellow banner at the top of the screen indicating that sync was successful and you'll see the screen below.



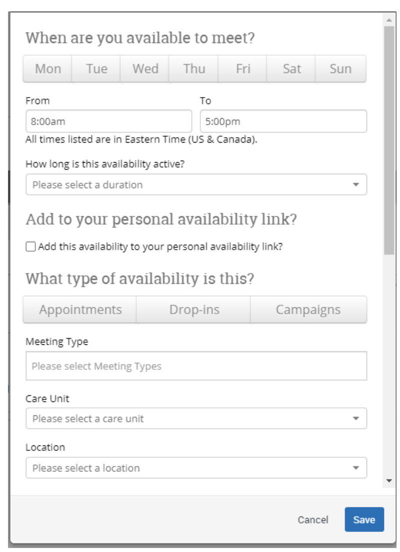
How to Set Your Availability in Navigate

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.

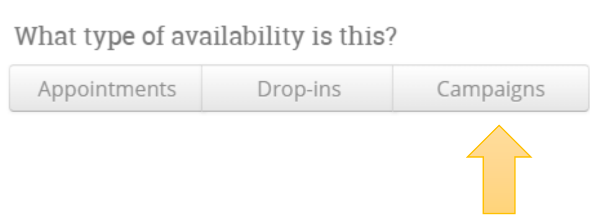
1. Click on the My Availability tab. Under Available Times, Go to the Actions menu and select Add Time



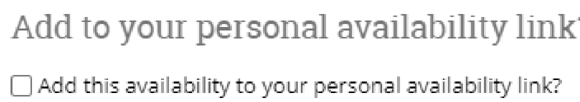
2. Select the days and times when you are available to meet with students



3. Select the Campaign button to be able to include your availability with your campaign.

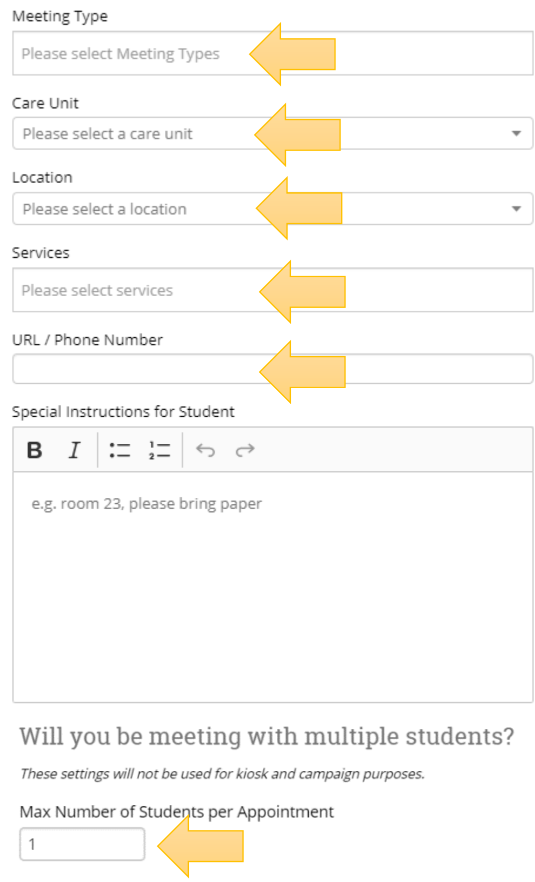


4. Determine if you want to have this availability associated with your Personal Availability Link. If yes, click on the box. If no, leave it unchecked.



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.
7. Choose the location where you are available from the drop down menu
8. Select which type of appointment(s) for which you are available in Services.
9. If it applies, you can add a URL or phone number for virtual appointments.
10. Select the number of students per appointment.
11. Click the Save button.

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

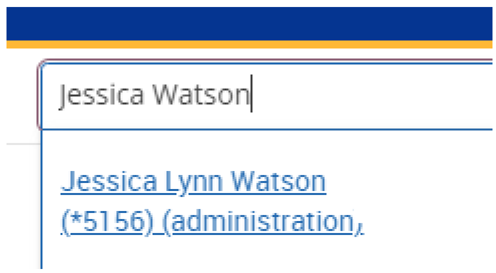


Tip: *Use the Special Instructions to Students box to include personalized information such as office number and/or directions. If you want different messaging depending on the type of appointment a student selects, you will have to set up a separate line of availability.*

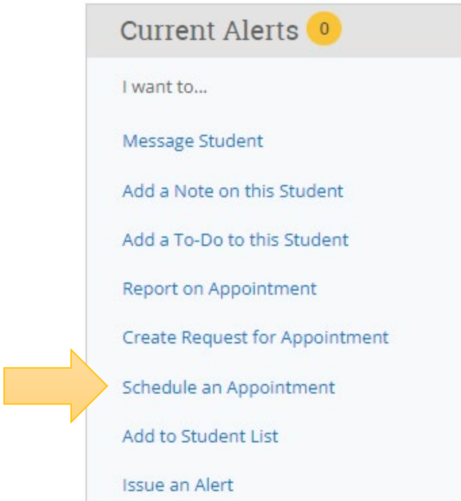
How to Search for a Student

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

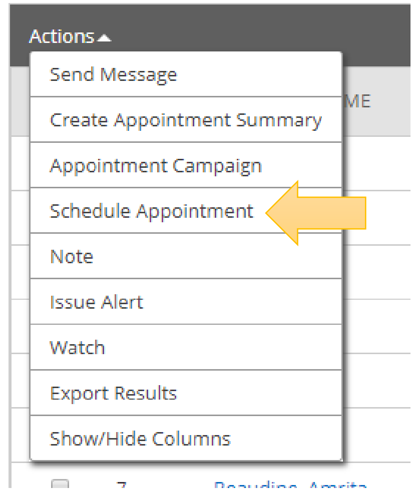
2. Type in the name of a student and select the student to view his/her home page.



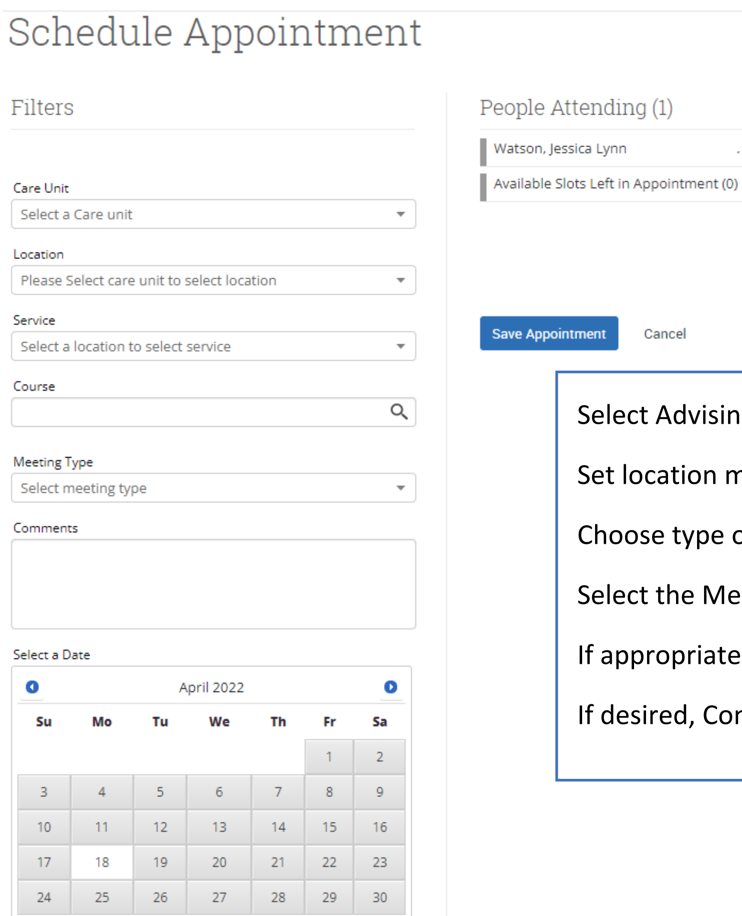
How to Schedule an Appointment



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 Advising in Care Unit

Set location meeting in Location

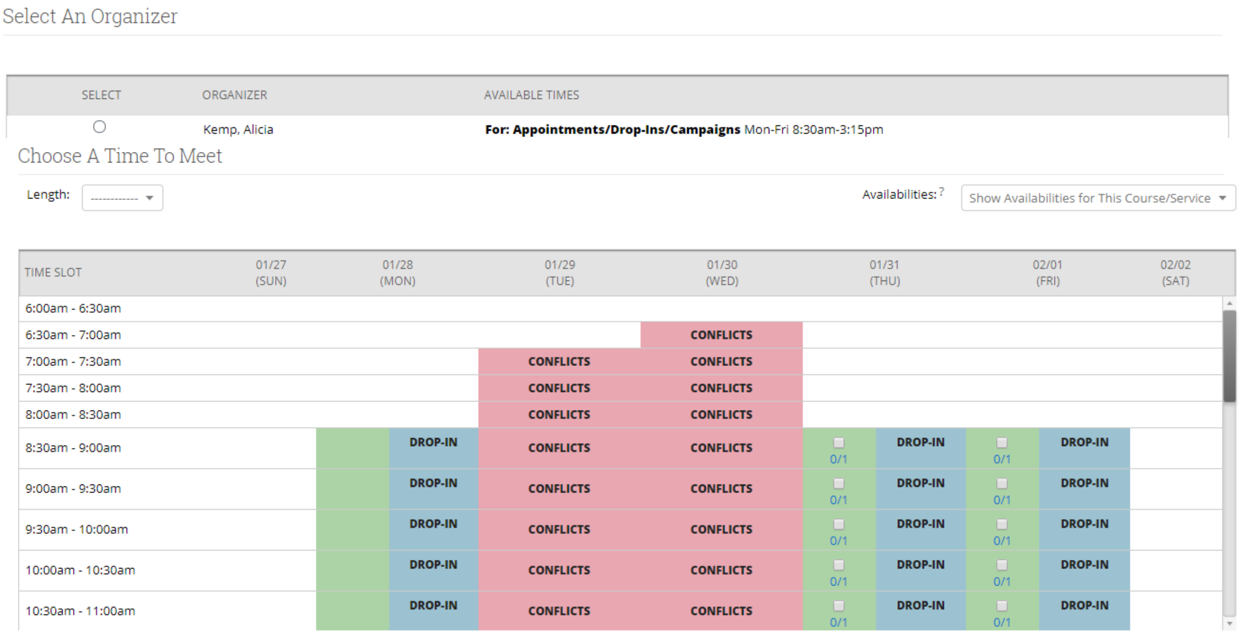
Choose type of appointment in Service

Select the Meeting Type

If appropriate, select the Course if needed

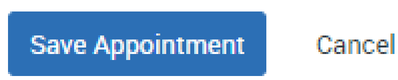
If desired, Comments could be added

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



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. If an appointment is available, that appointment will display with a small green box that will need to be checked to select it.

6. Click Save Appointment

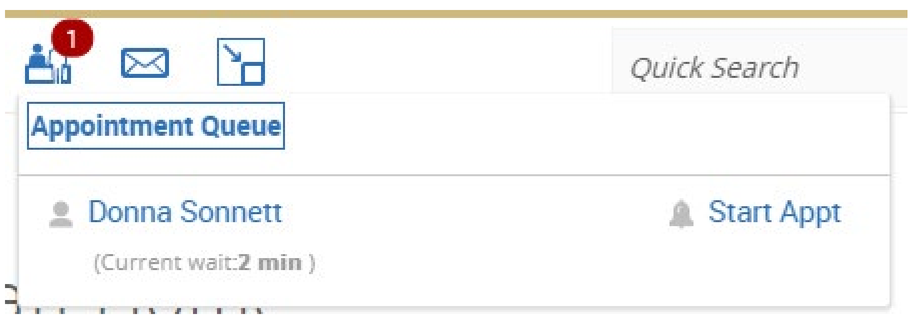


How to Complete an Appointment Summary Report When a Student Checks In for an Appointment at the Front Desk

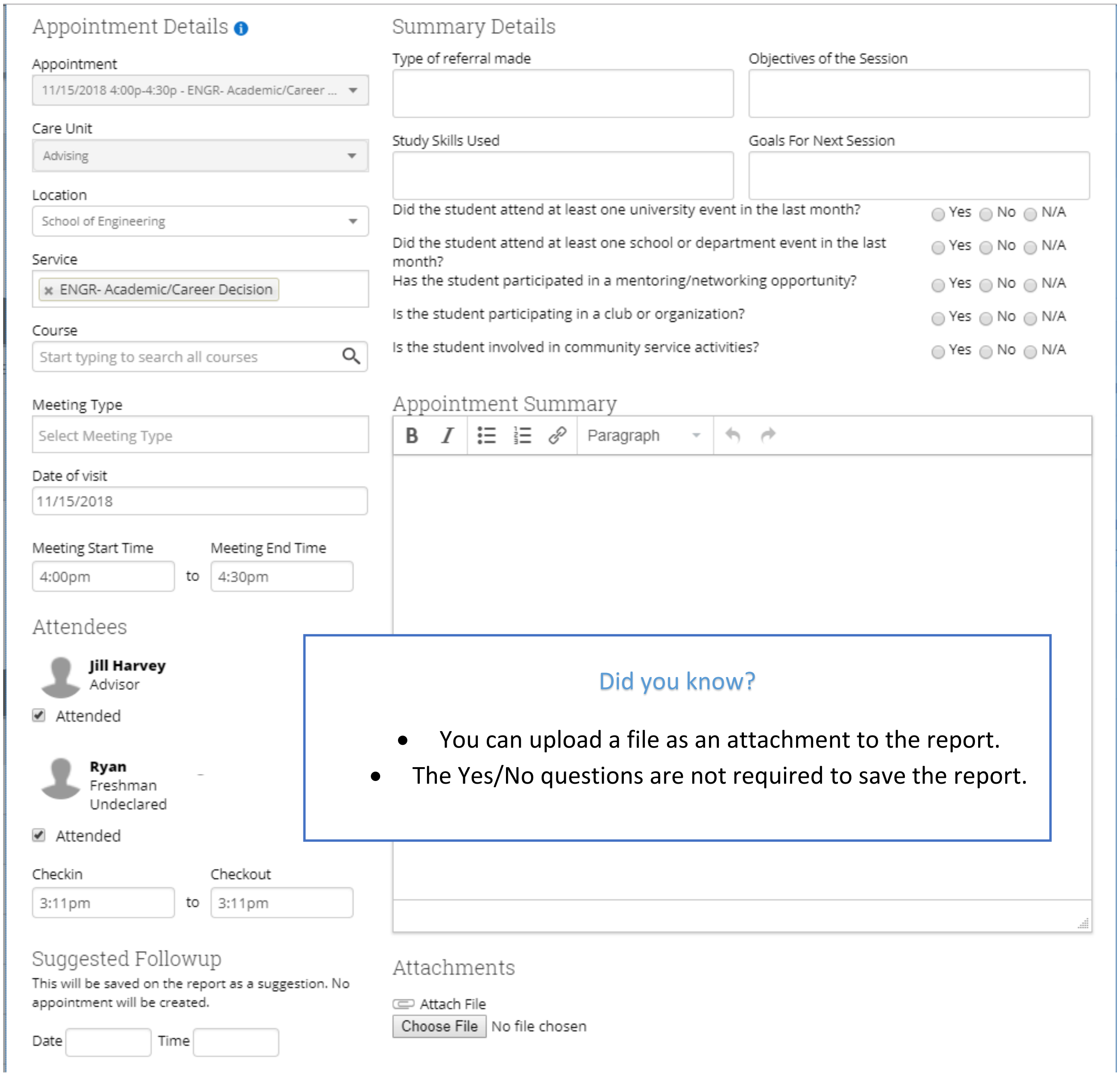
An Appointment Summary Report works like the notes you take on your advising appointments. It allows you to document advice or next steps that you have given to your student. Your Summary Report will also be visible to your colleagues to ensure consistent messaging.

1. When your advisee checks in for their appointment, you will be notified at the top of your screen.

2. Click on the icon and you can see the name of your advisee and how long they have been waiting. Click on Start Appt to start the appointment.



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

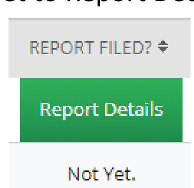


Did you know?

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

4. Once complete click Save this Report.

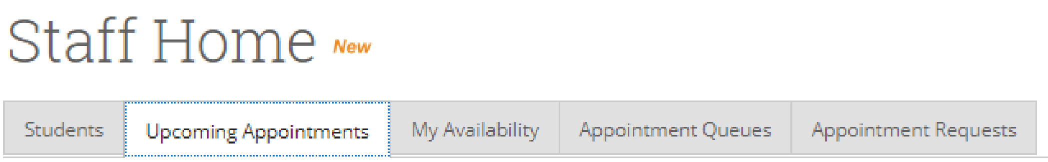
5. The Report Filed? column will change from Not Yet to Report Details in the Recent Appointments section.



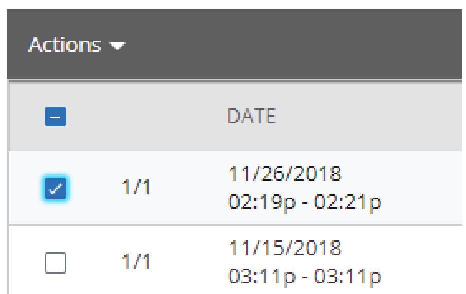
How to Complete an Appointment Summary Report When a Student Doesn't Get Checked In via the Front Desk

Sometimes, students just show up to your office or don't come through the usual channels. In these cases, being able to complete an appointment summary in Pathways help you to give the same level of attention to each student no matter how they get to your door.

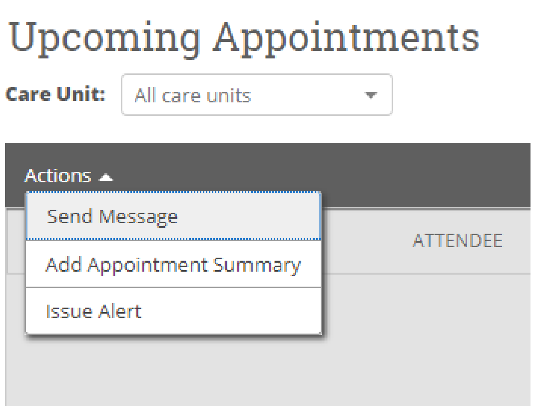
1. From your home screen, select the Upcoming Appointments tab.

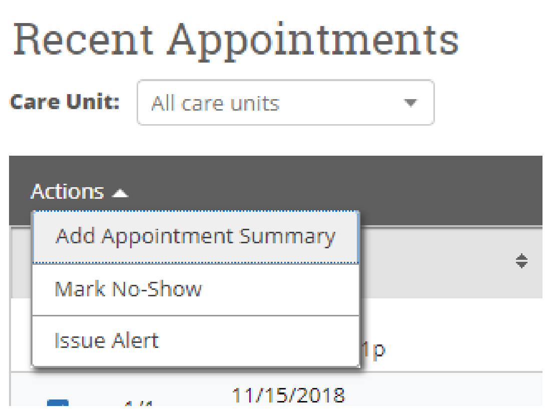


2. Select a student for whom you would like to create an Appointment Summary.

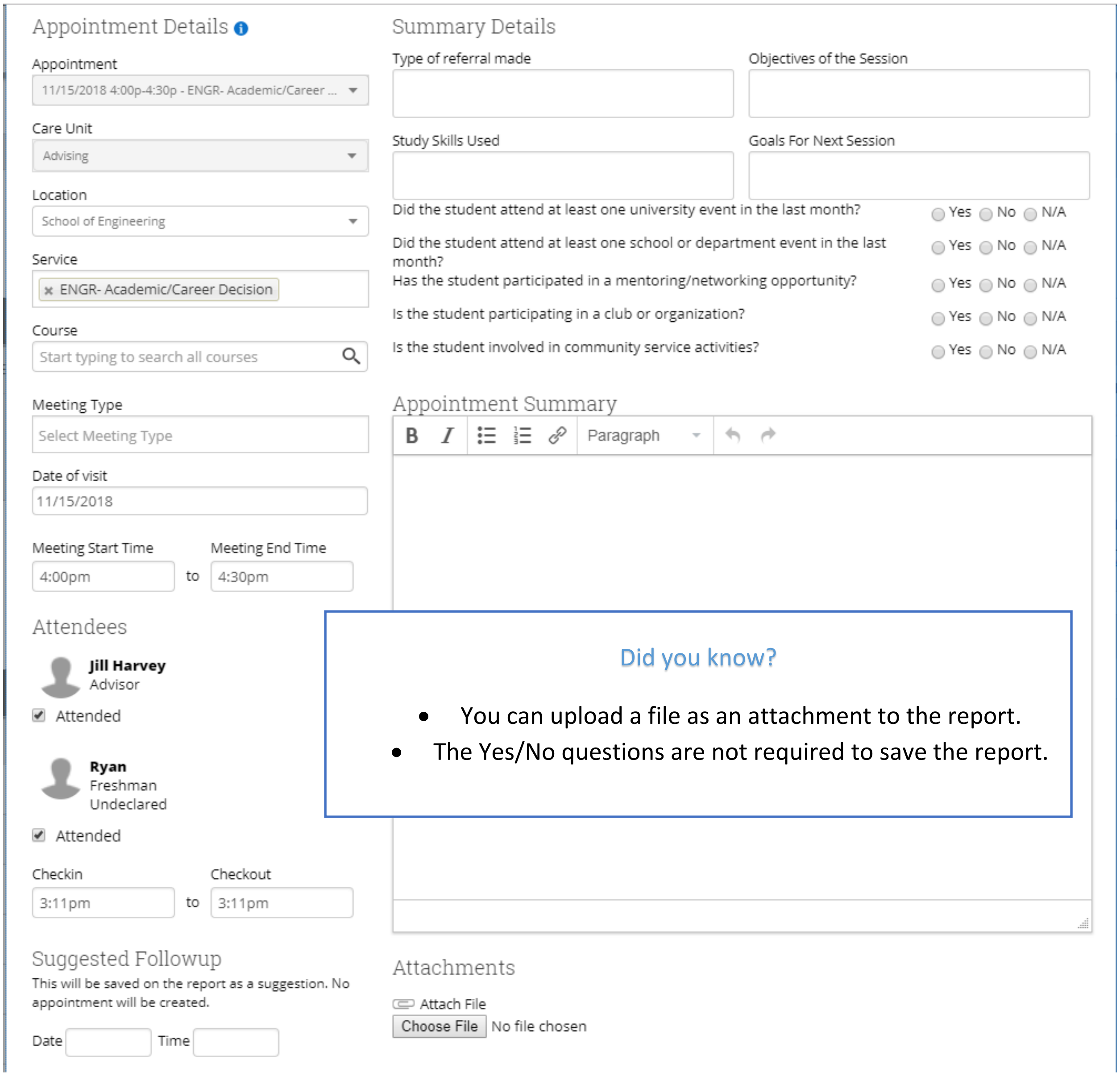


3. Scroll down to either the Upcoming Appointments or Recent Appointments sections. Under Actions select Add Appointment Summary





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

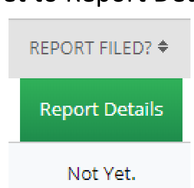


Did you know?

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

5. Once complete click Save this Report.

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

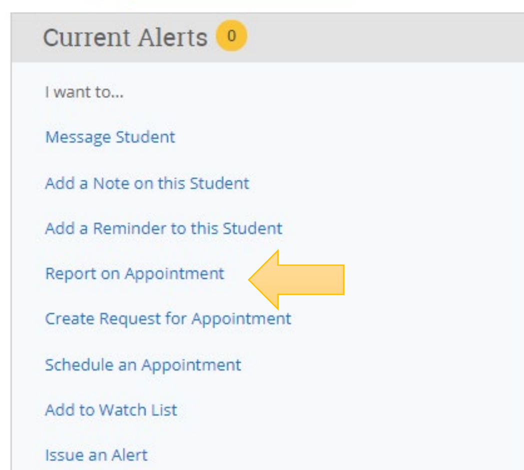


How to Complete an Appointment Summary Report without an Appointment

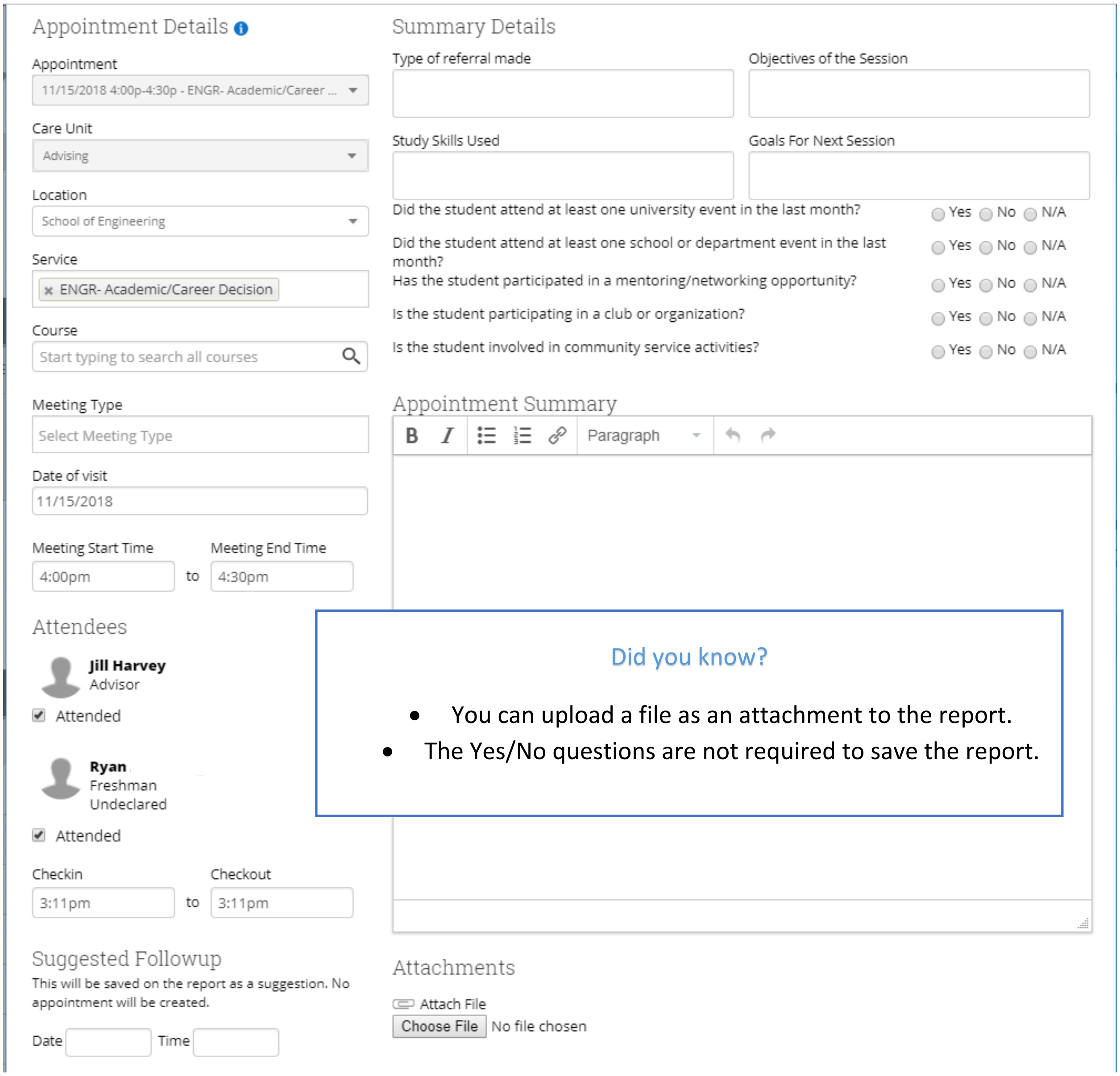
1. To search for a student, simply click on the "Quick Search" box in the center of the screen

2. Type in the name of a student and select the student to view his/her 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?

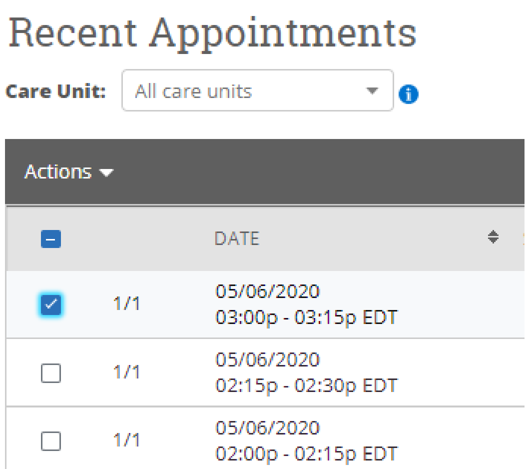
- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

5. Once complete click Save this Report.

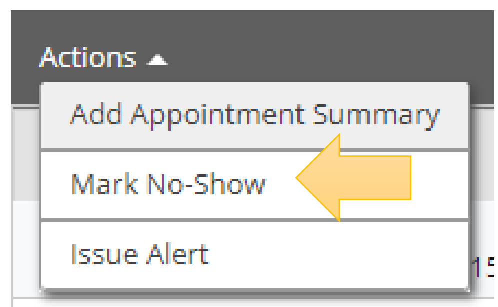
How to Mark an Appointment as a No Show

1. Scroll down to your Recent Appointments

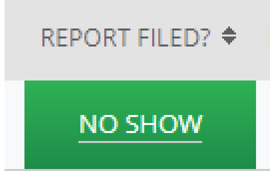
2. Click on the box next to the appointment you want to mark as a No Show.



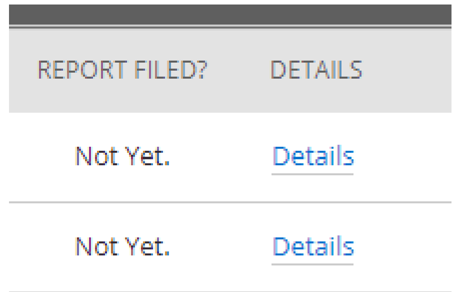
3. Open Actions button and select Mark No-Show



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

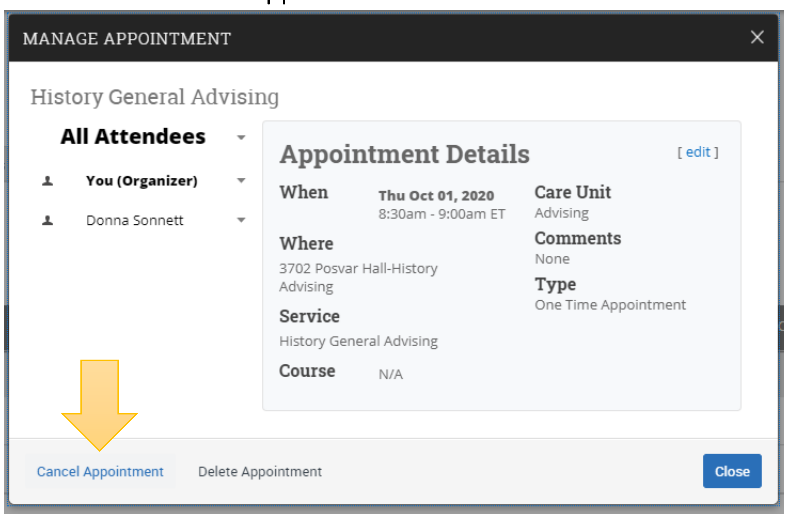


How to Cancel an Appointment



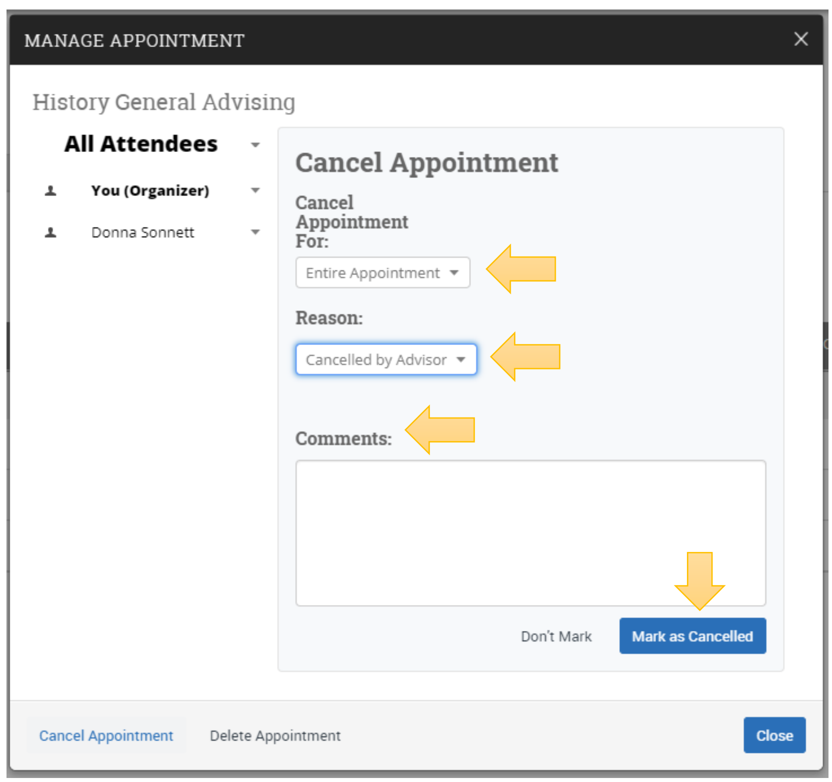
1. From your Upcoming Appointment tab on your Staff Home page, click on the Details link for the appointment you want to cancel.

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

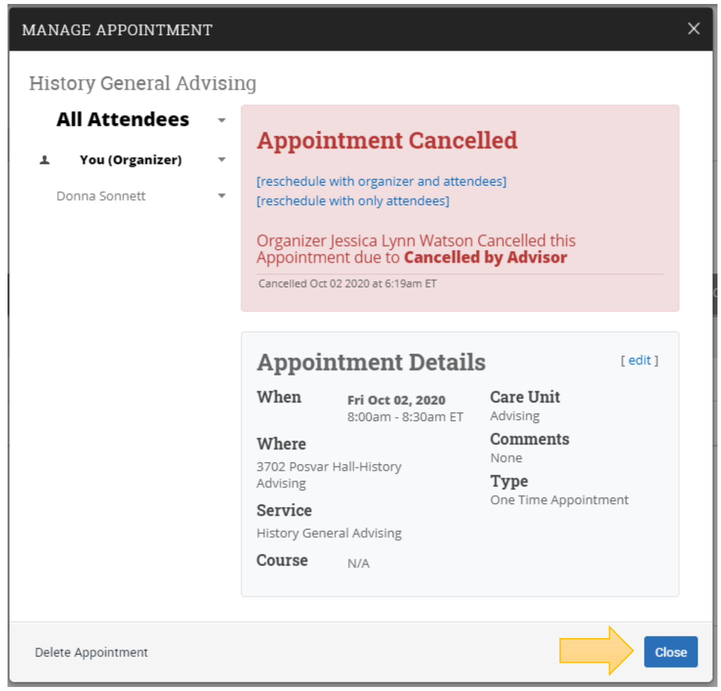


Delete Appointment will erase all data around that appointment and will not show up in any reporting. It is not advised.

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

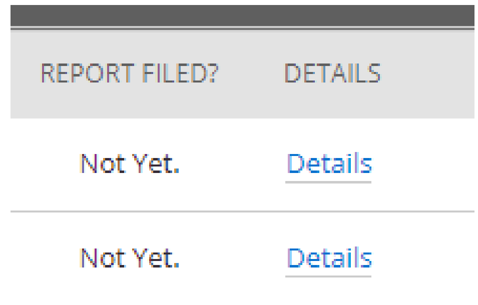


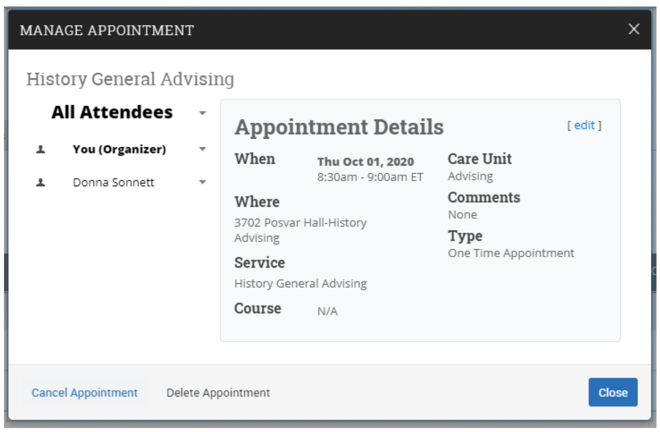
7. You will get confirmation that the appointment was canceled, then click Close.



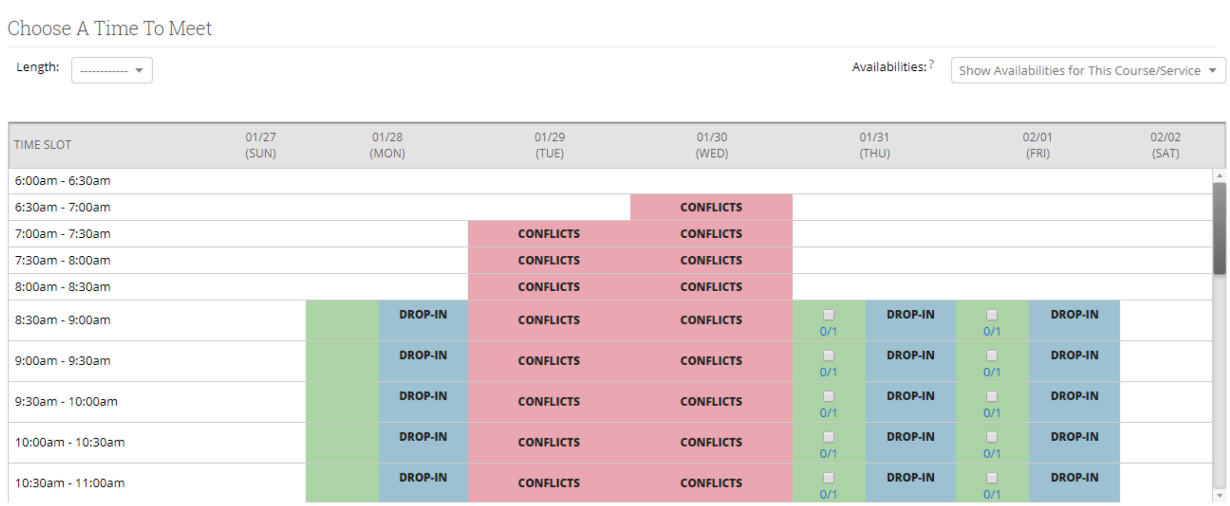
How to Edit an Appointment

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.

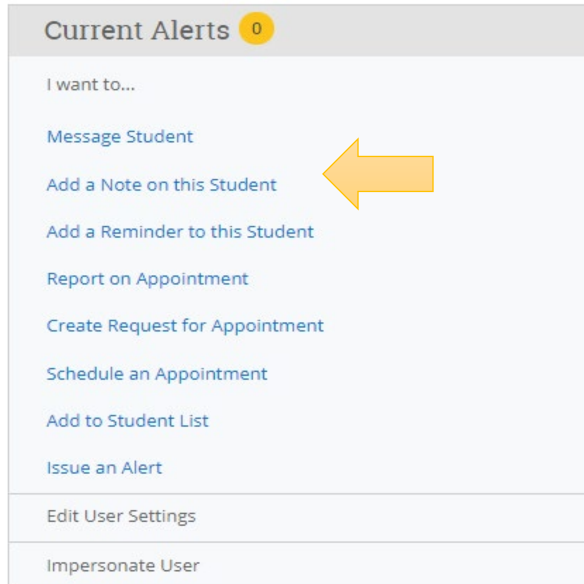


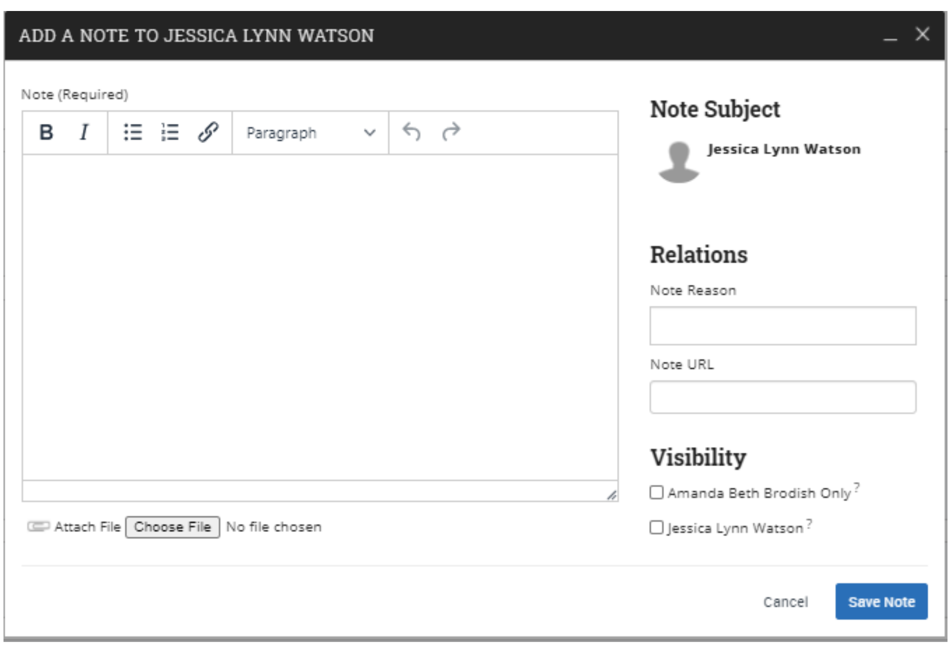
5. Save Appointment and an update will be set to both the advisor and student.

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.

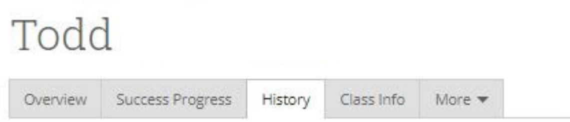




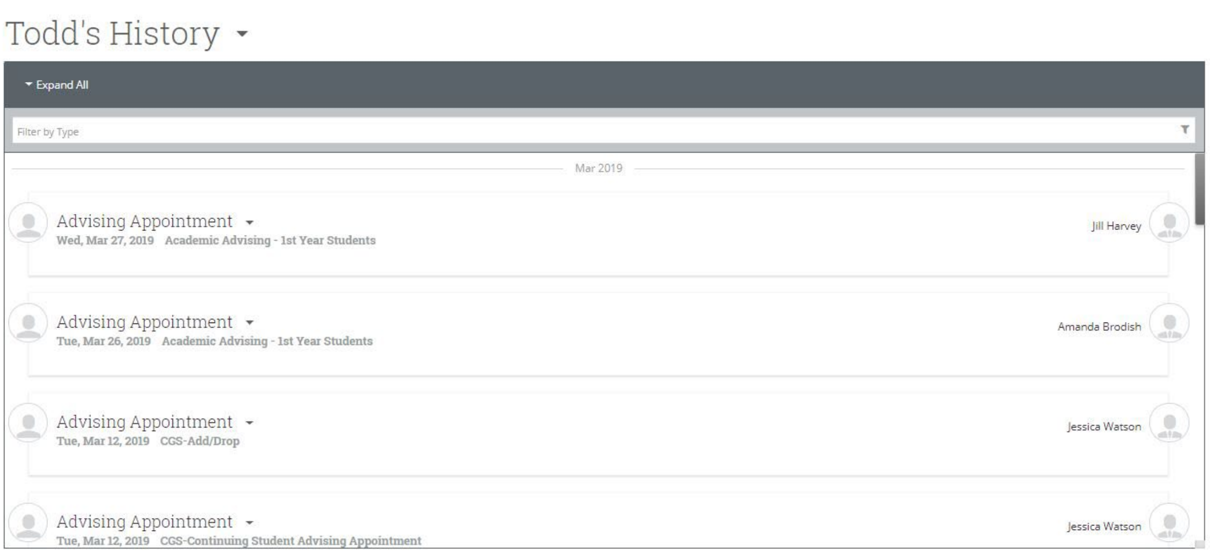
2. Type your note. You can make the note only visible to you. If you don't check that box, everyone can see your note. Regardless of who can view the note, it is still subject to FERPA. Checking the student's name does not mean that the student will get an email about the note. It means that if the student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

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.



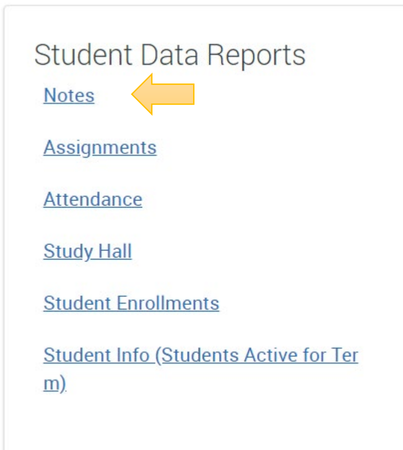
2. Once on the “History” tab, scroll down to the “[Student Name]’s History” section. You will see a chronological list of all appointment summaries and notes left for a particular student, along with the date and name of the advisor who left it. You can click on the down arrow to view the report or note.



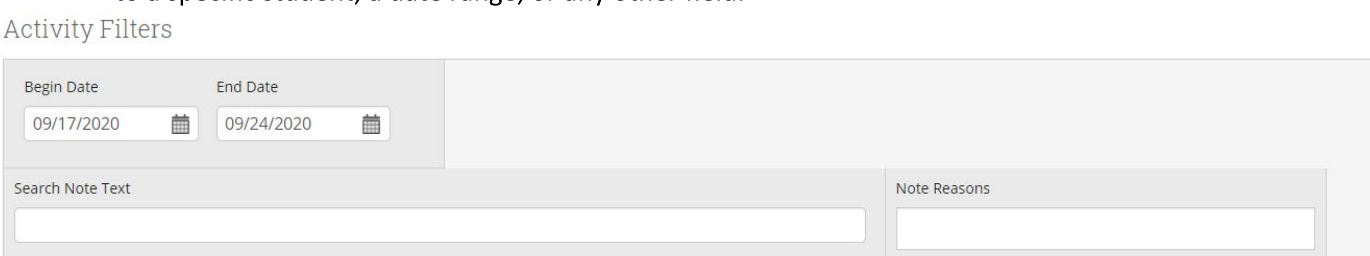
How to Search Notes Using Reports

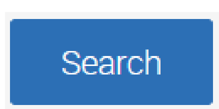
1. Select Reports 

2. Under Student Data Reports, click Notes.



3. In Search Notes Text, you can search the notes for specific words in the text. If you add a hashtag inside the note, you would be able to search for it here. You can also limit your search to a specific student, a date range, or any other field.

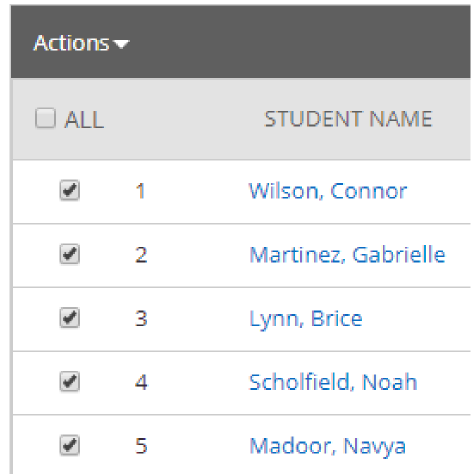


4. Click Search. 

5. Once you find the note you are looking for, you can click view. The note will open in its full form which will often be easier to read than the line returned in the search result.

How to Create a Student List

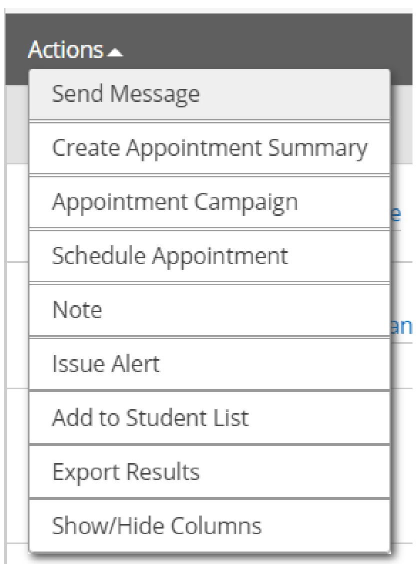
To help keep track of a list of students, you can create a student list. This is a list of students manually created and maintained by a user that highlights a particular population. This list can be used for Advising Campaigns, communications, or other monitoring.



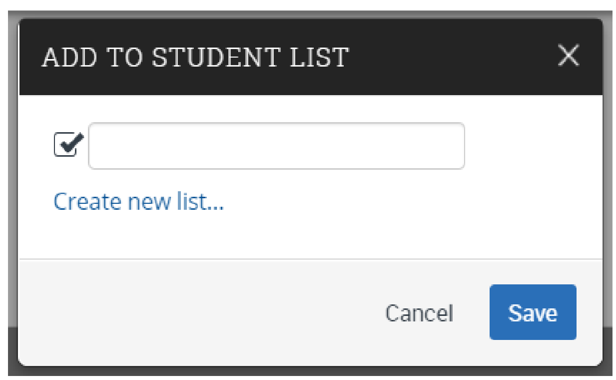
1. Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students or by using the search functionality.

Search Icon

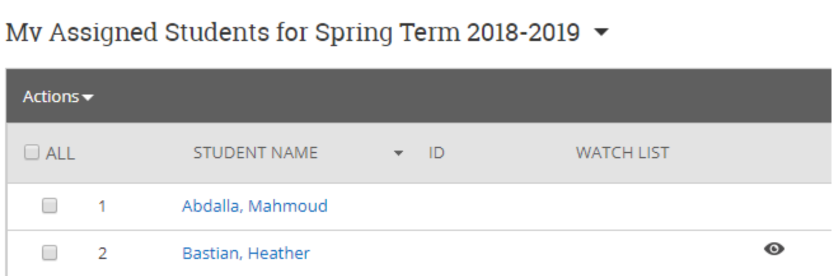
2. Under Actions select Add to Student List



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



4. In your list of students, a small eye icon will appear next to the name of the student.



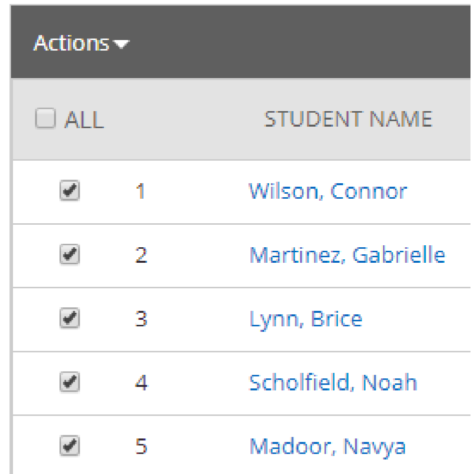
Reminder:

Hovering your mouse over the eye icon will tell you to which of your Student lists the student is assigned.

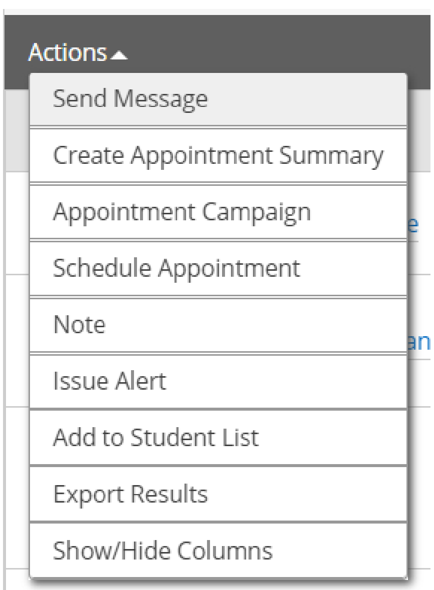
A student can be assigned to more than one list

How to Add Students to an Existing Student List

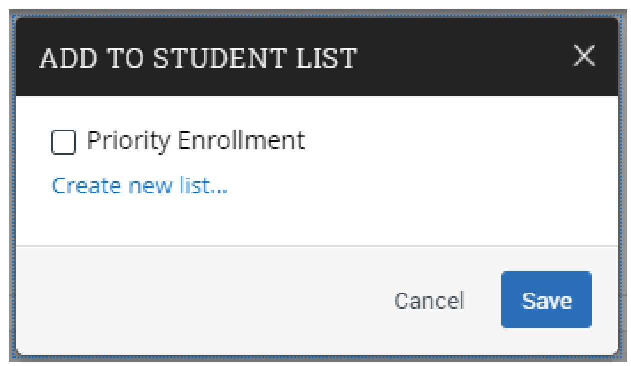
1. Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students, by using the search functionality or even from your list of appointments.



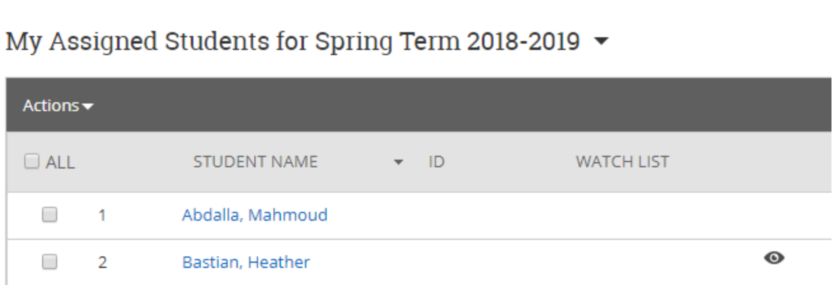
2. Under Actions select Student List.



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

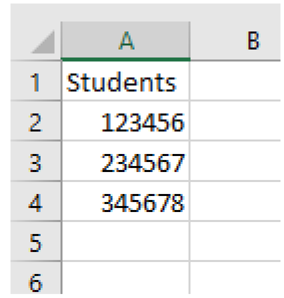


4. In your list of students, a small eye icon will appear next to the name of the student. A student can be assigned to more than one Student list. Hovering over the eye icon, will show to which of your lists a student is assigned.



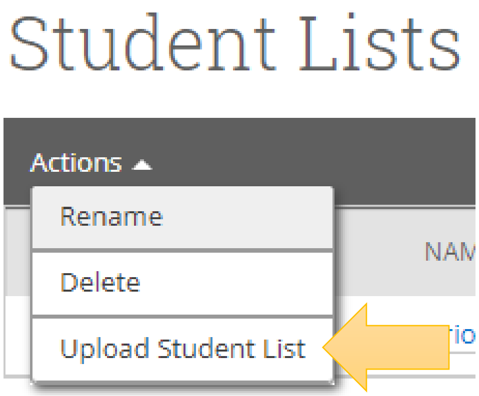
How to Upload a Student List via Batch

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.



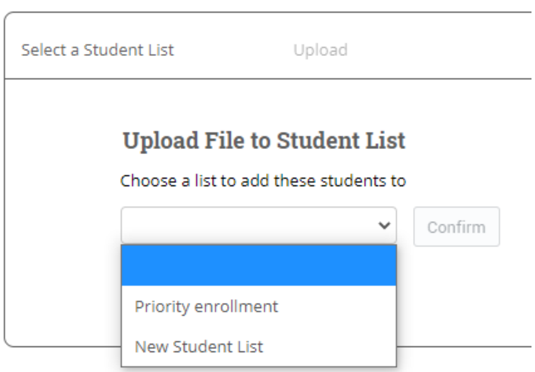
1. Before you start in Pathways, you will need to create a .csv file in Excel. The spreadsheet should be simply a header and a list of PeopleSoft IDs of the students that you want to include in your Student List.

2. Click on the List & Searches icon. 

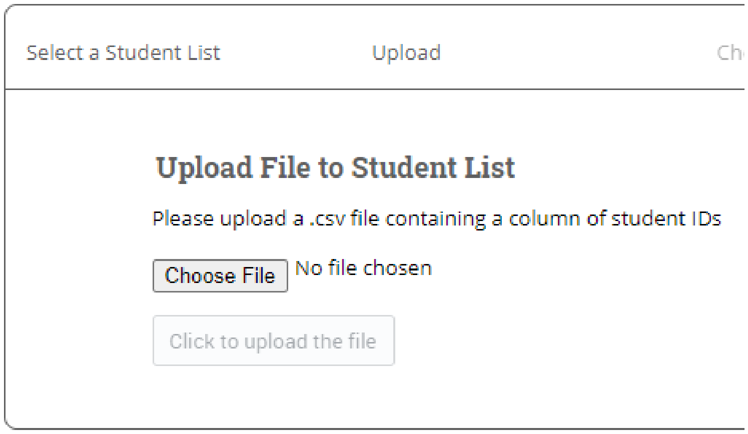


3. Click the Actions drop down and select Upload Student List.

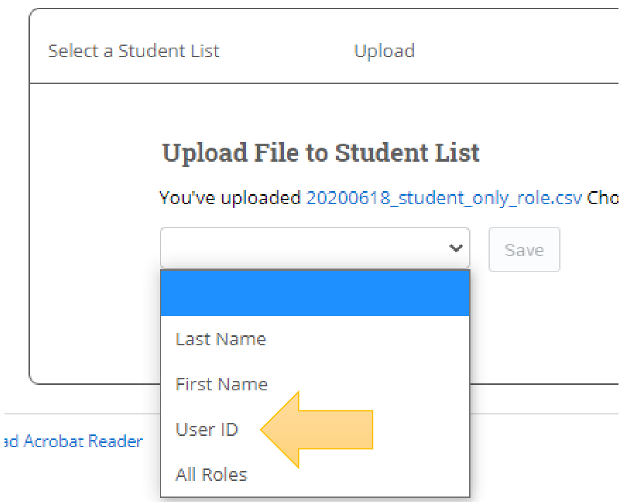
4. To choose a list, click on the little triangle and select the list or create a new one then click Confirm.



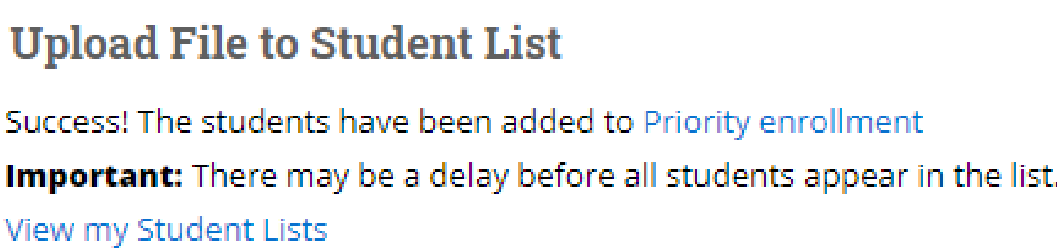
5. Click on the Choose File button to select the file you want to load and click on the Click to upload the file button.



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



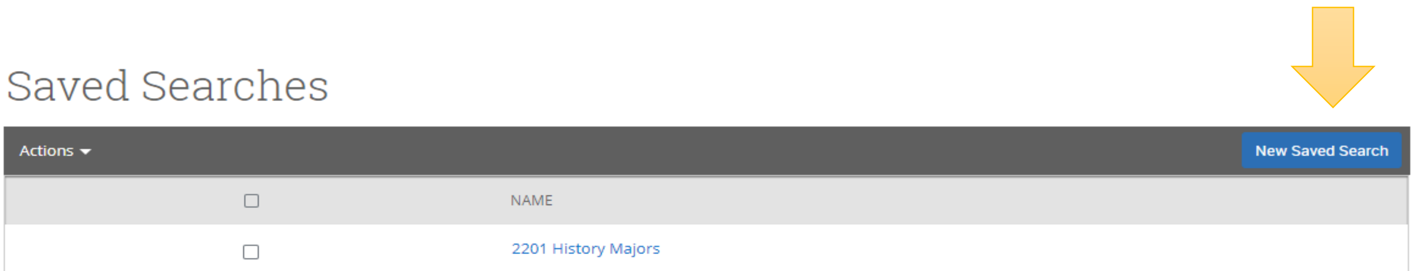
7. Depending on the size of the Student List, it may take a few minutes to load all of the students into the Student List.



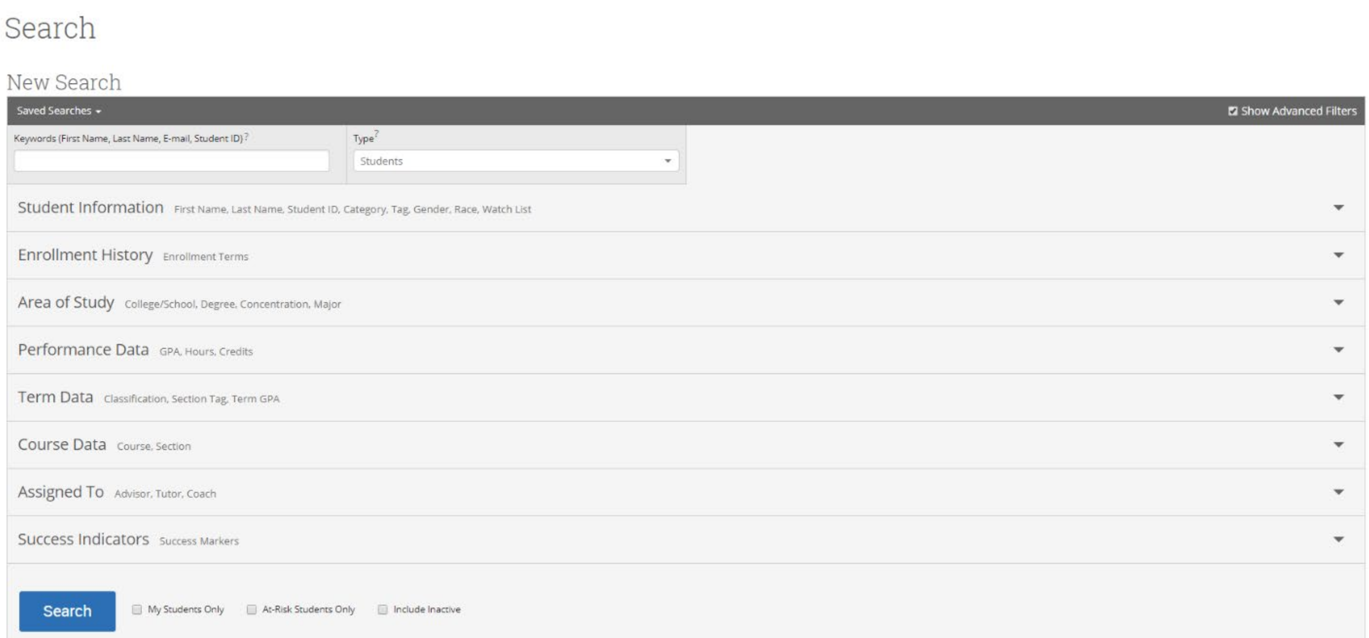
How to Create a Saved Search

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

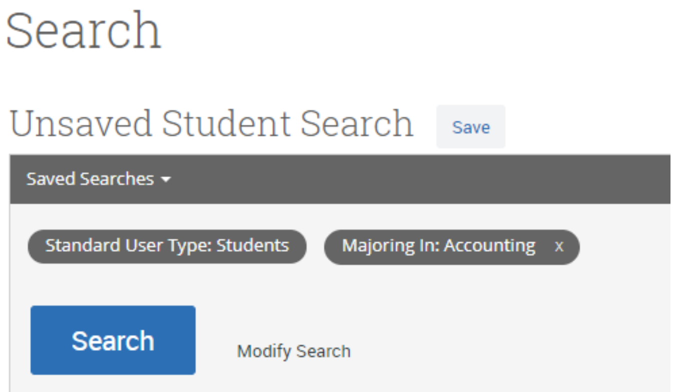
2. Under Saved Searches, click the button New Saved Search



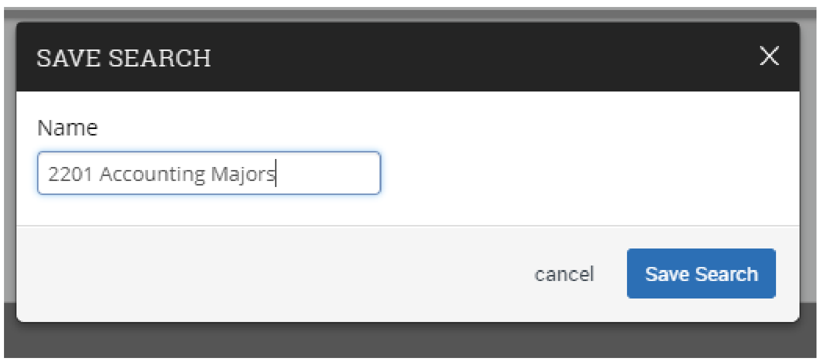
3. Use the search function and filters to select a group of students. Click Search.



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



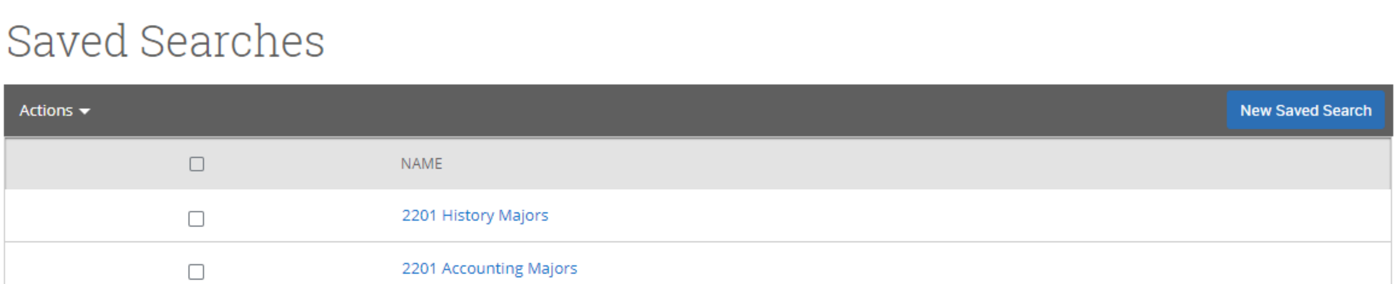
5. Name your list. Click Save Search.



How to Access Your Saved Search

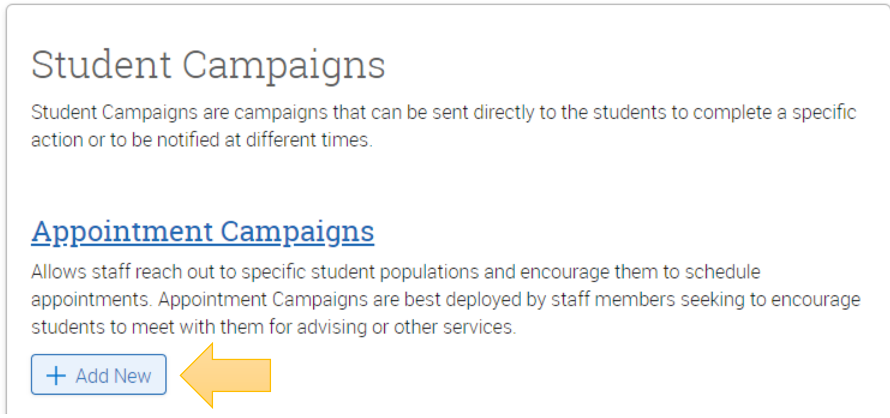
1. From your homepage, click on the Lists & Searches Icon

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

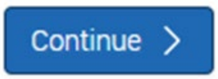


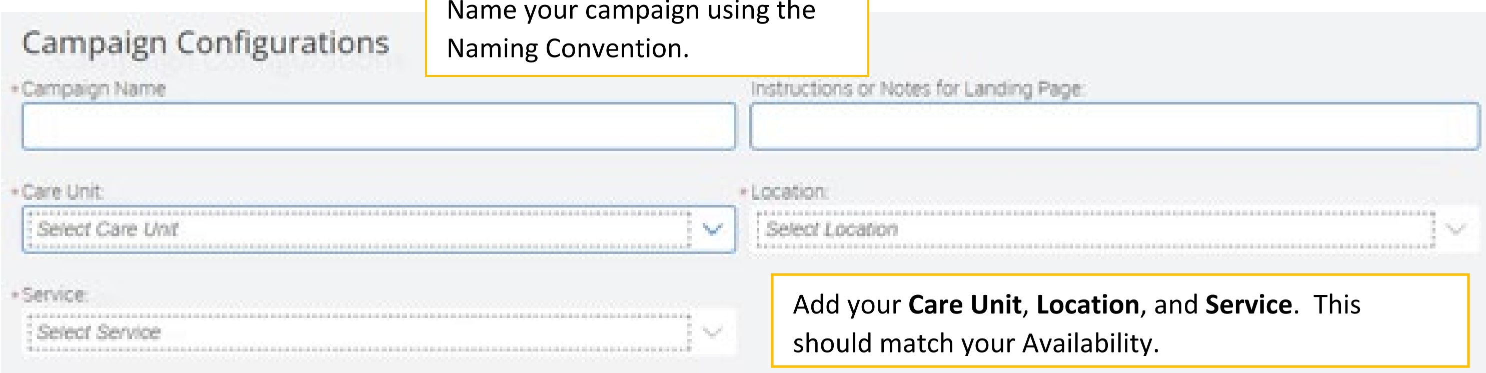
How to Create an Appointment Campaign

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.



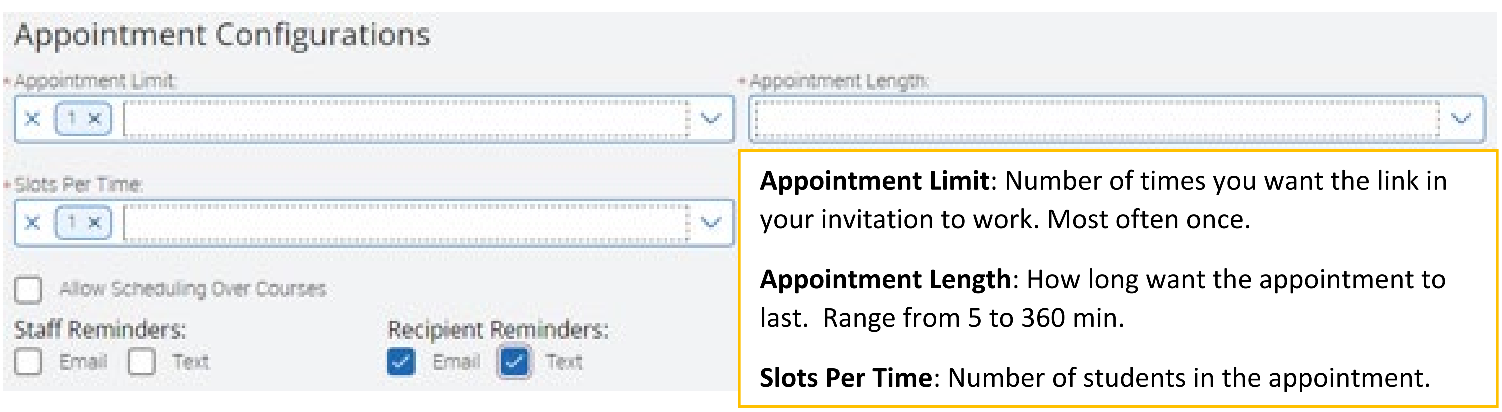
3. Define your campaign. When finished, click Continue.





Name your campaign using the Naming Convention.

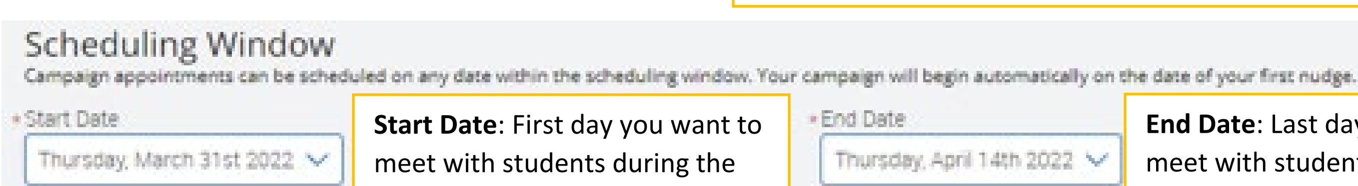
Add your **Care Unit**, **Location**, and **Service**. This should match your Availability.



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.

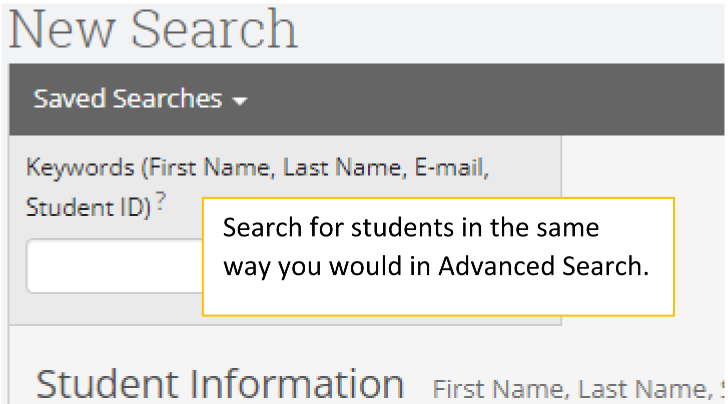
Slots Per Time: Number of students in the appointment.



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

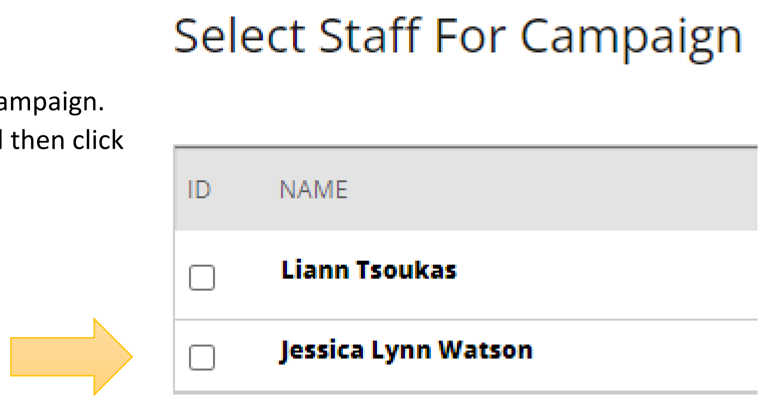
End Date: Last day you want to meet with students during the campaign.

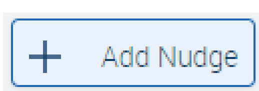
4. Find students to add to the Campaign by searching them and clicking Search.



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.

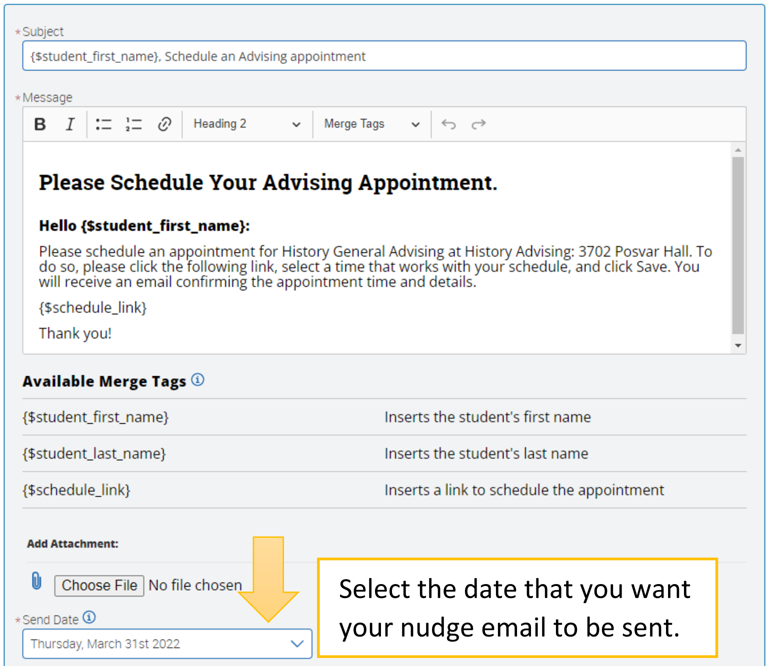
6. You will need to add Staff to your Campaign. Click the box next to your name and then click Continue.



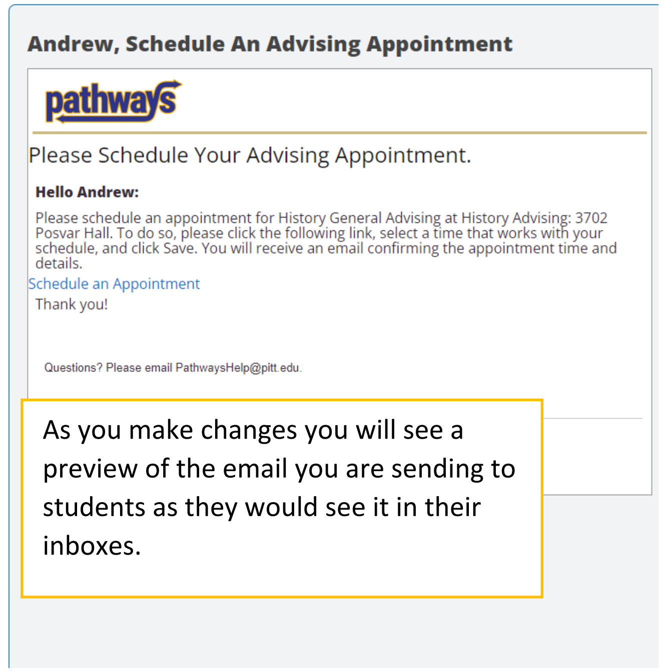


7. Now you compose your email message or Nudge. To do this, click the Add Nudge button.

Add Nudge



Preview Email



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.

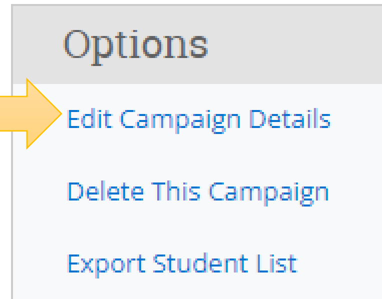
9. Using Nudges, you can resend email reminder messages to the students who have not yet made an appointment with you. You can add as many Nudges as you want when you set up your Campaign, and they will be sent out on the day you choose. Once you have set up all of your nudges, click Continue.

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!

10. Confirm your Appointment Campaign and click Start Campaign.

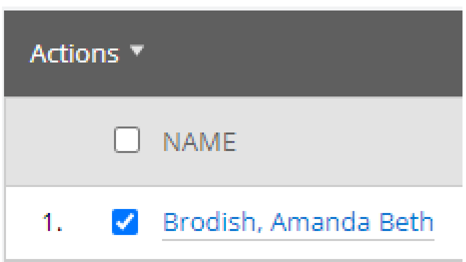
How to Add a Student to an Existing Campaign

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. 

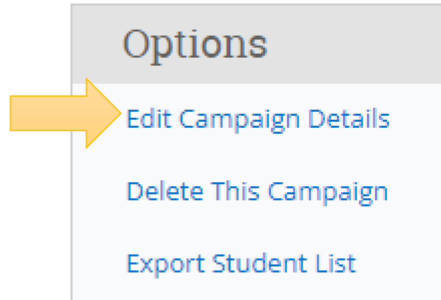
6. At the bottom of the screen, click Save and Exit.

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

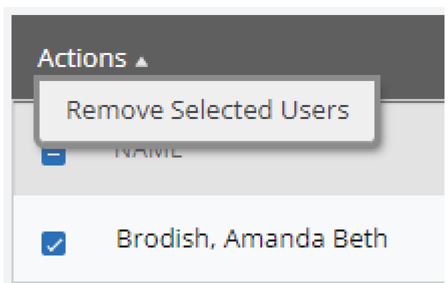
How to Remove a Student from a Campaign

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

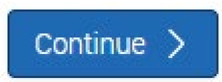


3. Select Verify Recipients at the top of the screen.



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

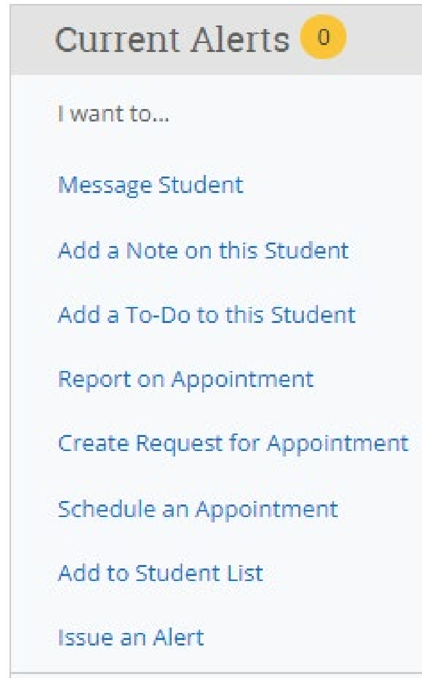


6. Once you have removed the students, click on Verify and Start to get to the last screen.

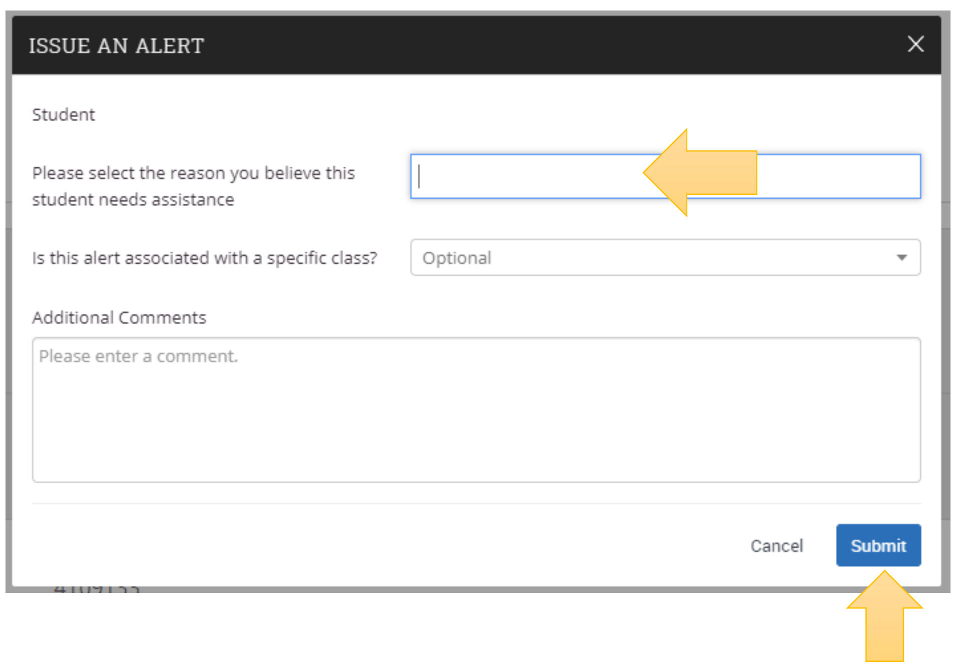
8. Click Save and Exit to save your changes.

How to Make a Referral for a Student

Referrals should be used for non-emergency situation only. For a complete list of Referral and Case Management Information, click here.



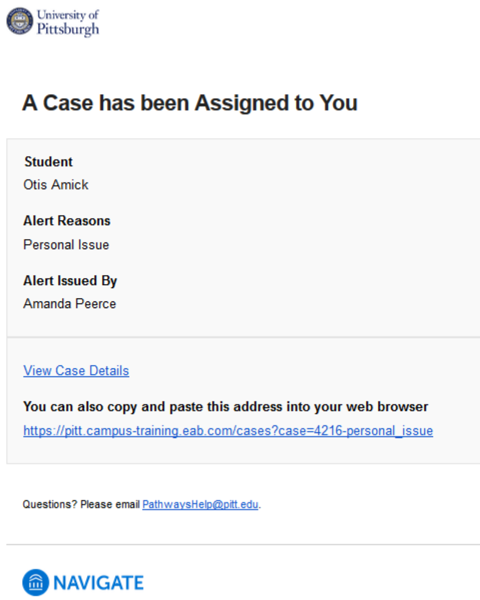
1. From the student's page, click Issue an Alert on the right side of the screen



2. Click on the drop down and select the group you want to refer the student to
3. Add comments in the Additional Comment box to give additional information and click Submit

How to Manage a Referral

1. When a referral that has been associated with has been made, an email will be sent to you


University of Pittsburgh

A Case has been Assigned to You

Student
Otis Amick

Alert Reasons
Personal Issue

Alert Issued By
Amanda Peerce

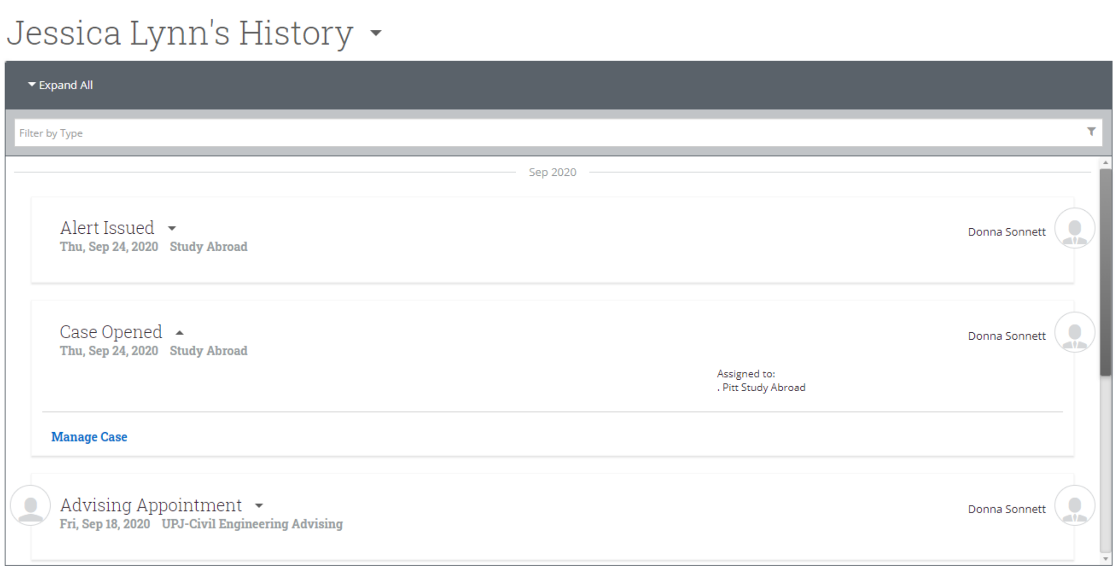
View Case Details

You can also copy and paste this address into your web browser
https://pitt.campus-training.eab.com/cases?case=4216-personal_issue

Questions? Please email PathwaysHelp@pitt.edu.

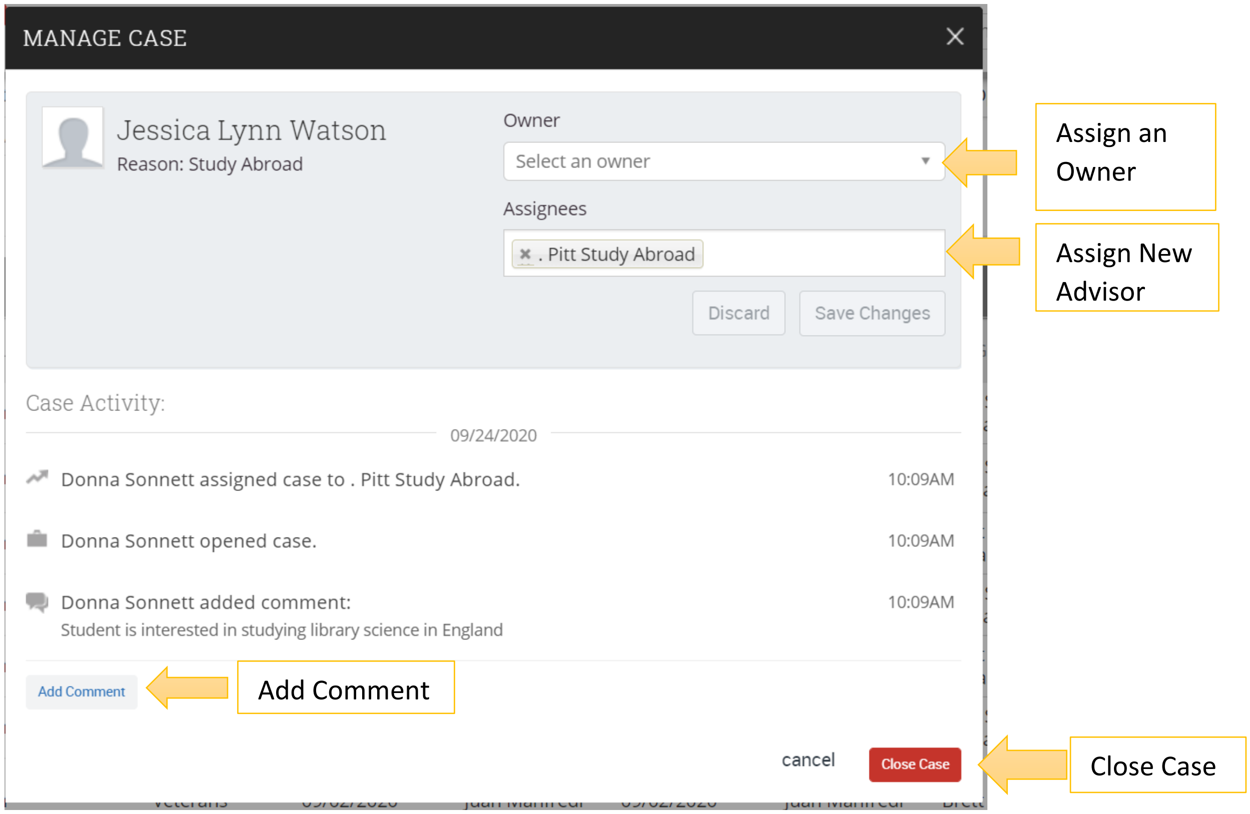
NAVIGATE

2. There are two ways to "manage" a case to which you've been assigned:
   a. Via the student's history tab:



   b. Or via the case tab on the left-hand side of the screen 

3. Using your unit's more detailed document on recommended actions and follow-up, you can add a comment, assign a new advisor to the case, or a close a case.
4.

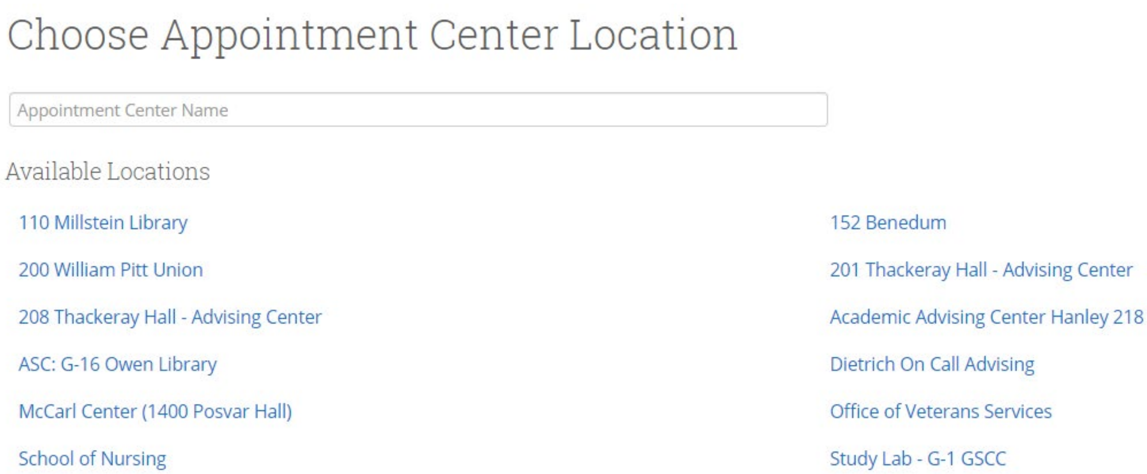


5. Current case outcomes are below.
   a. Student Registered for Classes
   b. Student Not Registered After Attempts
   c. Unable to Track Down Student
   d. Student Responded to Academic Advisor
   e. Student Received Support

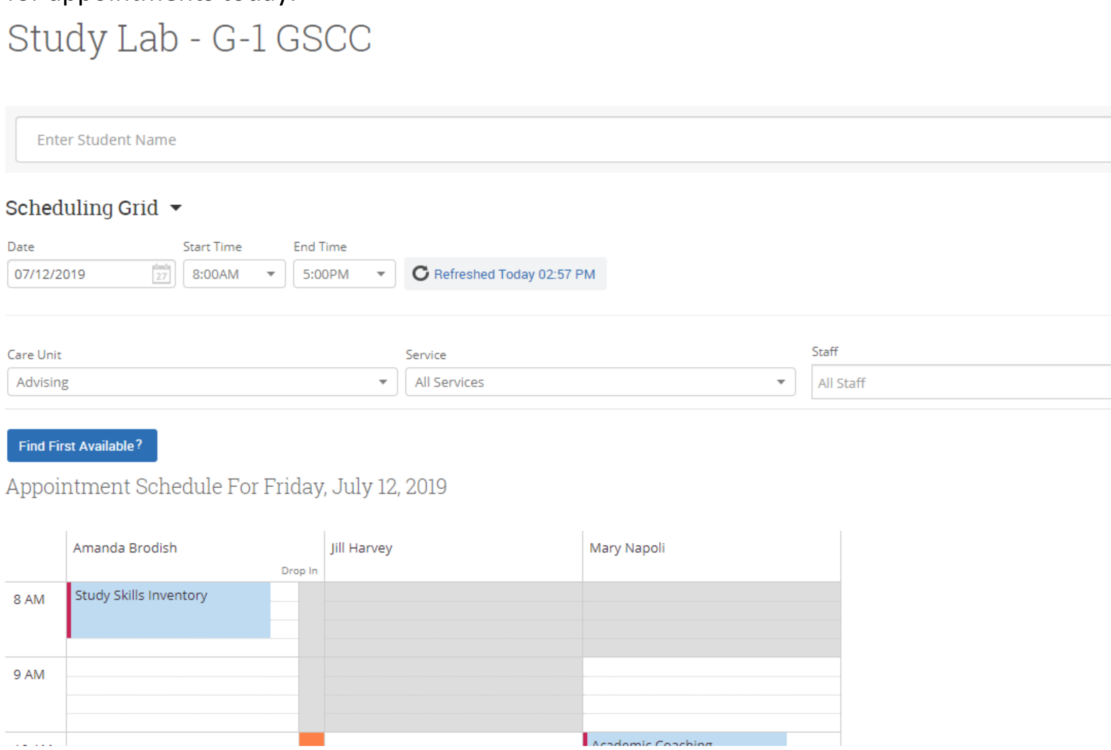
How to Launch the Appointment Center

1. In the bottom right hand corner of the screen, click on Additional Modes. Select Appointment Center.

2. Click on your Appointment Center location.



3. You now can see the Appointment Center for your location including advisors who are available for appointments today.

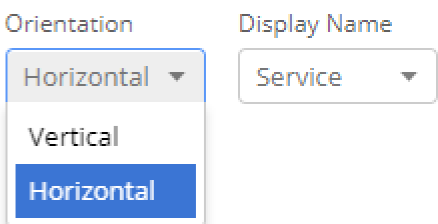


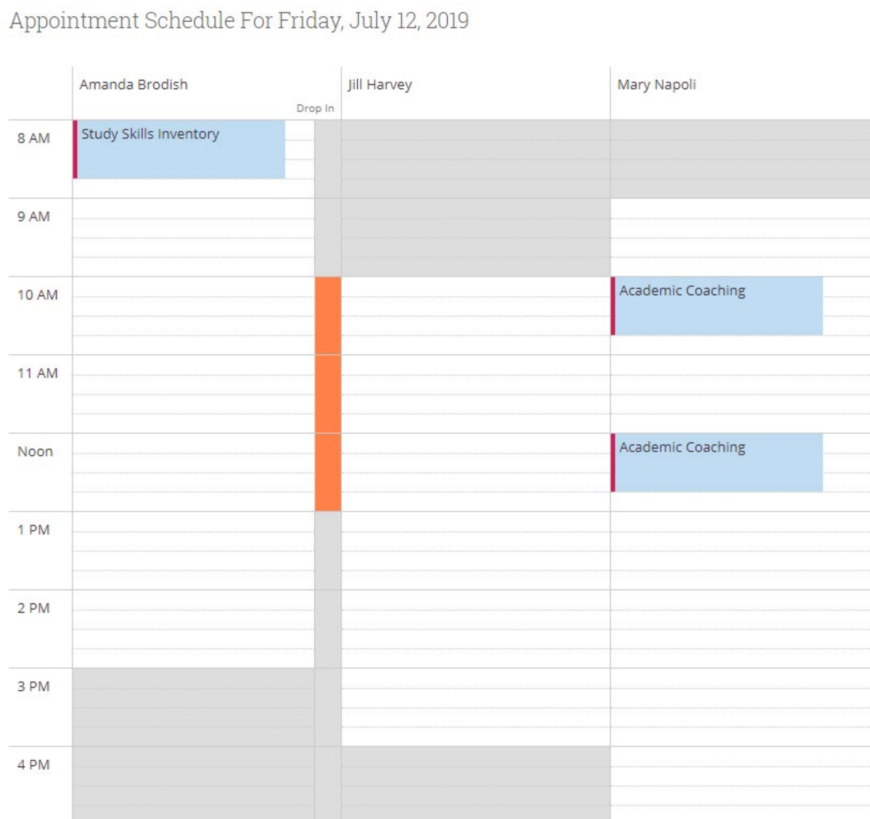
How to Use Your Appointment Center

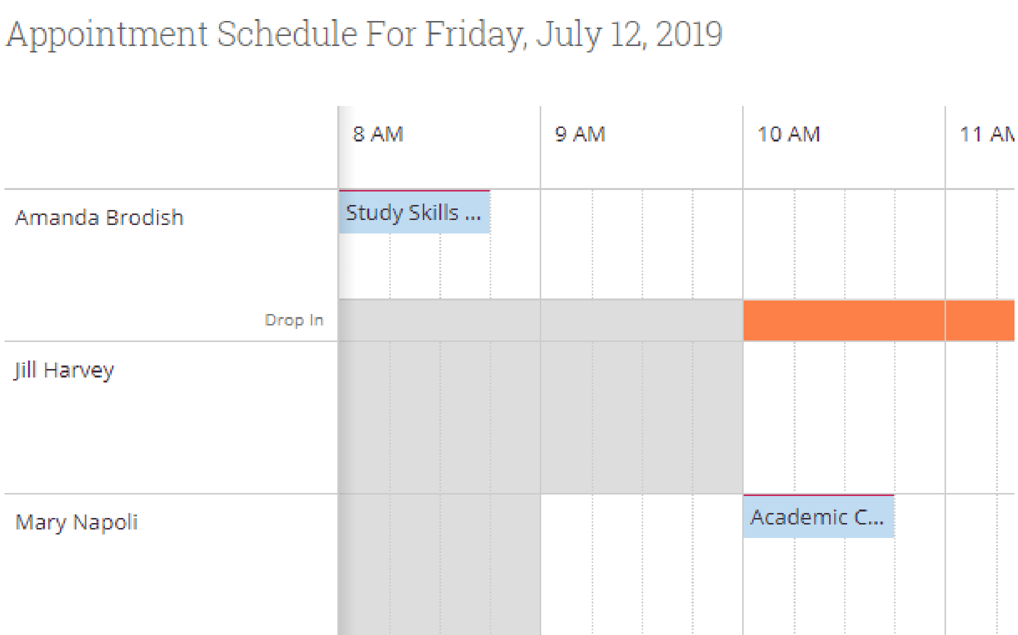
Change the way you view the appointments

1. The default to view your appointments is a vertical grid.

2. To change to a horizontal view, click on the Orientation drop down and select Horizontal



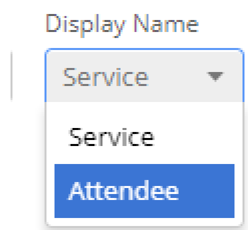




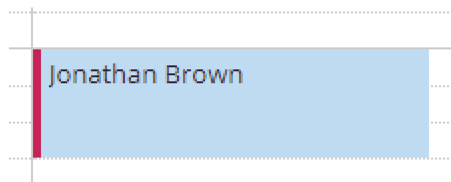
3. Now you can view your appointments horizontally. This can be easier to view a larger group of Advisors.

<u>Please note:</u>
Currently there is no way to make this change the default.

Change the way the names of appointments are displayed

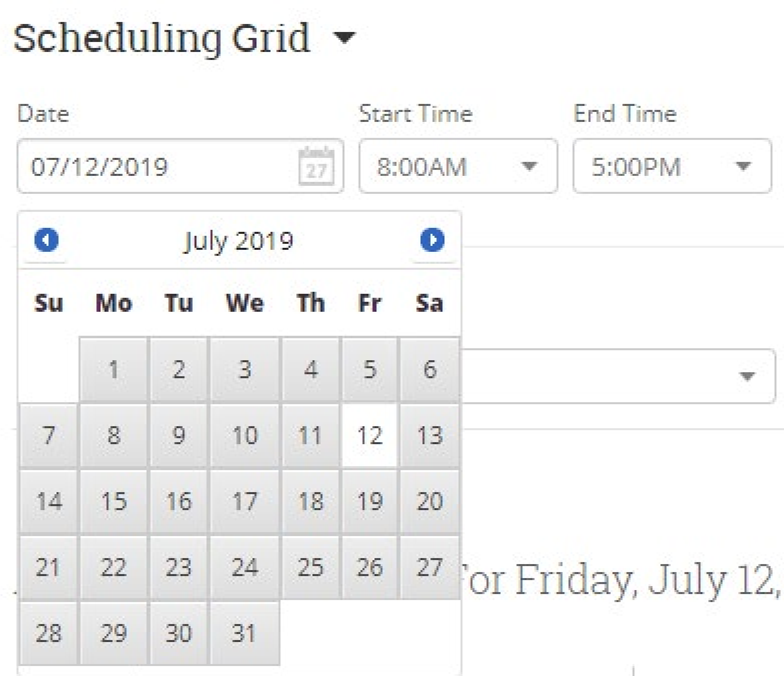


The default display name on your appointment is the name of your Service. To change the name that is displayed on the appointment to the name of the student, click the Display Name drop down and select Attendee. Now the name of the student will show up in their appointment slot rather than their Appointment type.



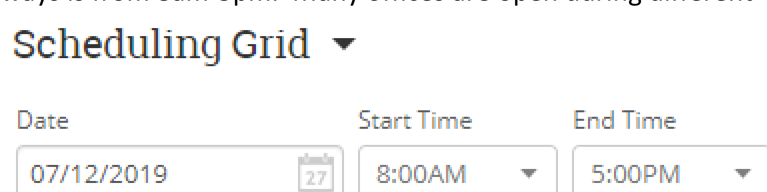
Change the date you are viewing

To make an appointment on a different date, click on the Date field under the Scheduling Grid. Select the date you want to make an appointment on in the calendar. Follow the instructions on how to schedule an appointment.



Change the start and end time of the Scheduling Grid

The default appointment times in Pathways is from 8am-5pm. Many offices are open during different hours. To change the time, simply click on the drop down menus called Start Time and End Time to change the time you see in your grid.



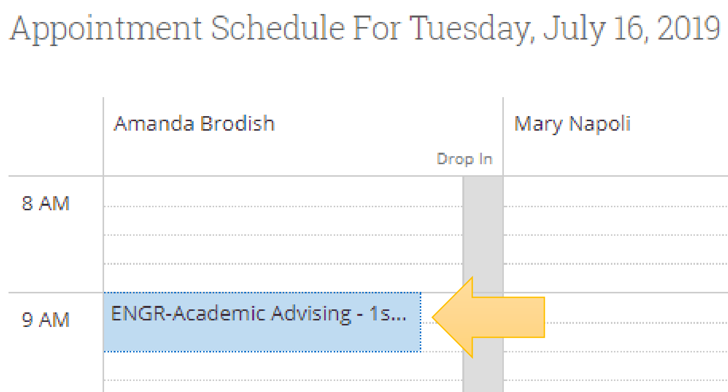
<u>Please note:</u> Currently there is no way to make any of these changes the default.

How to Check In a Student for a Scheduled Appointment

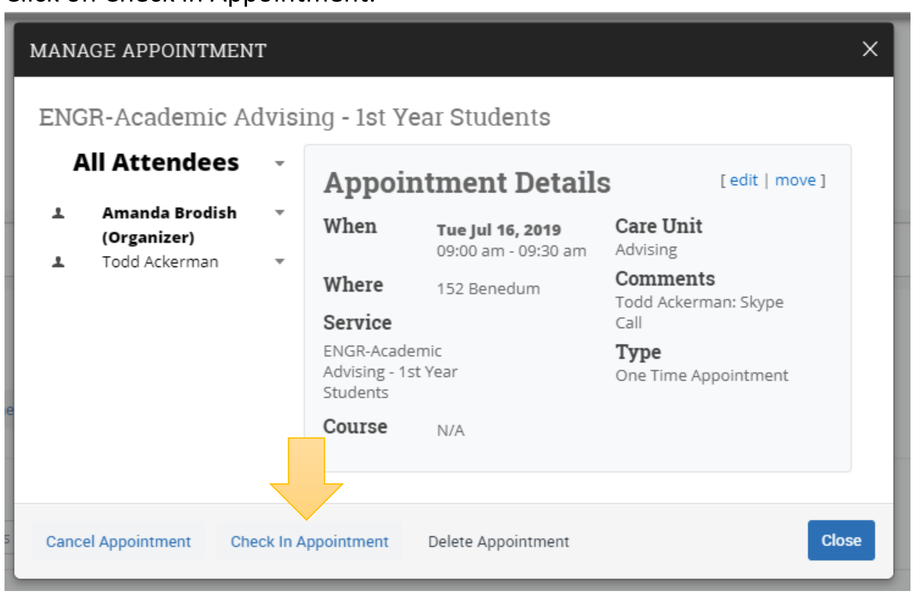
Manual Check-In

Using Scheduling Grid

1. Click on the appointment

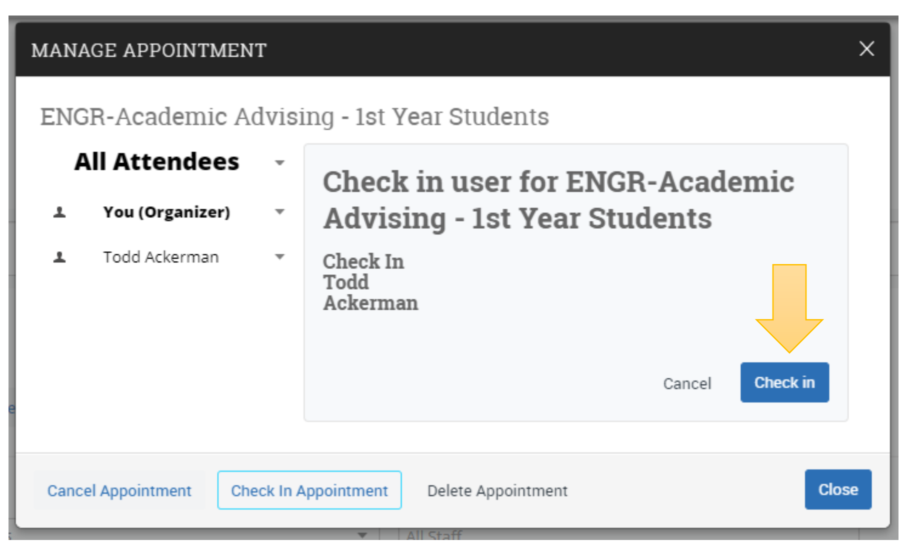


2. Click on Check in Appointment.



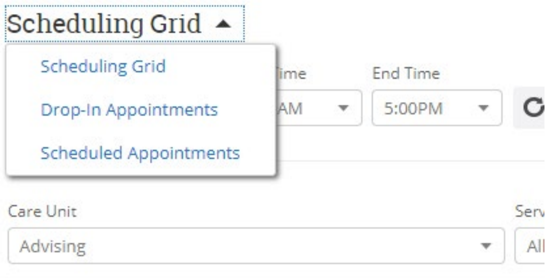
3. Click the blue check in button.

4. A notification will be sent to the Advisor to let them know their student is here for their appointment.

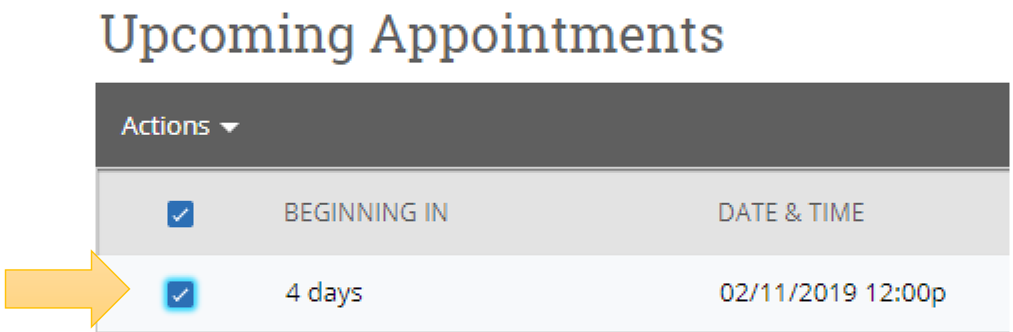


Using Scheduled Appointments

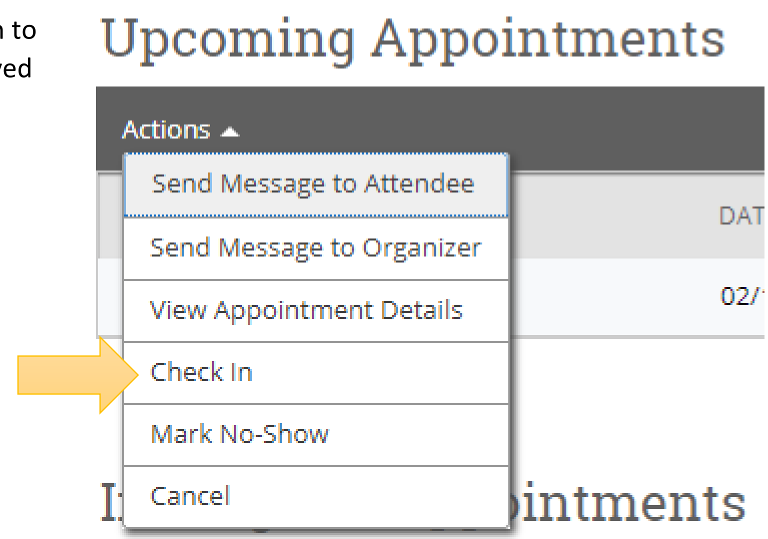
1. Use the Scheduling Grid drop down to select Scheduled Appointments



2. Under Upcoming Appointments, click the box next to the student who needs checked in.



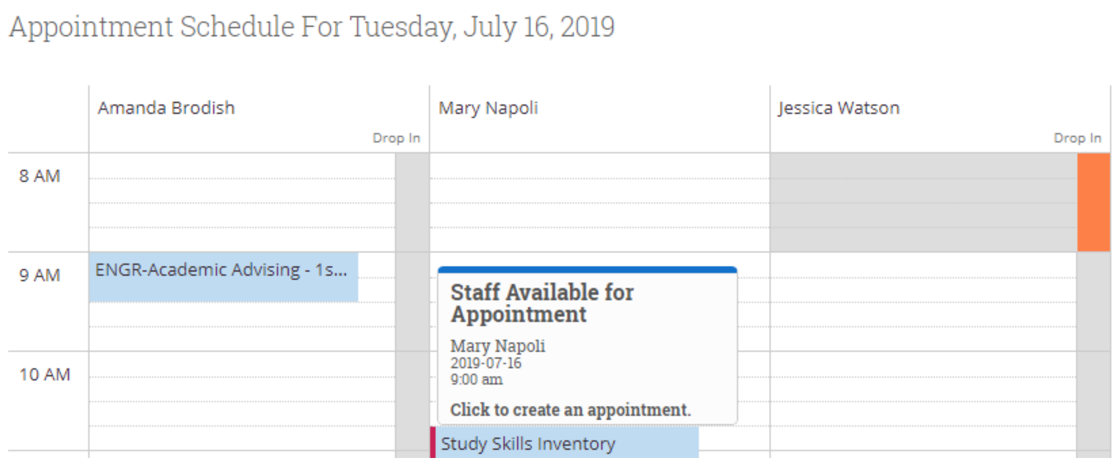
3. Use the Actions drop down to select Check In. This will send a notification to the advisor that the student has arrived for their appointment.



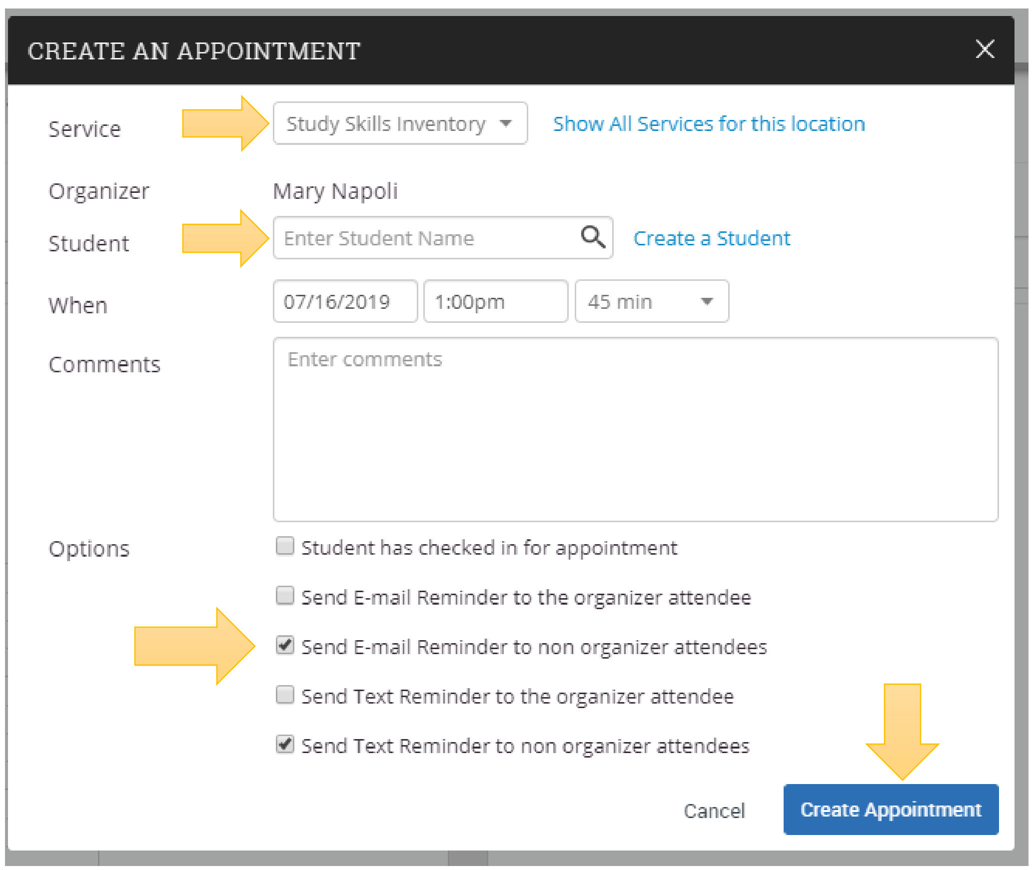
How to Schedule an Appointment

Appointment Center

1. In the grid of the chosen advisor, click on the time that you want to schedule the appointment.



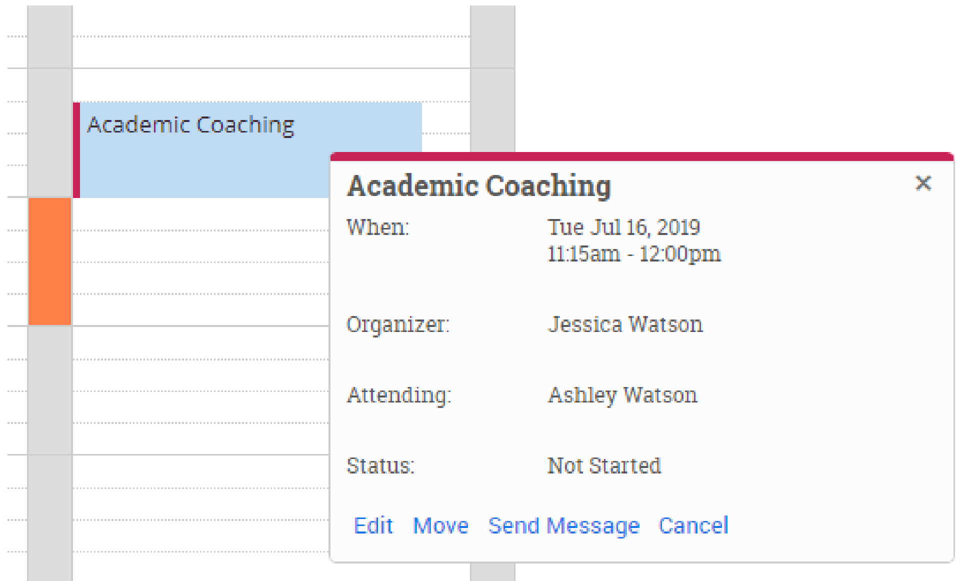
2. Click the Service or type of appointment that you want to schedule. If the appointment that you are looking for isn't in the drop down, that advisor hasn't made themselves available for that appointment.
3. Search for the student's name.
4. Select the reminders that you want to set up for the organizer and attendee.
5. Click Create Appointment.



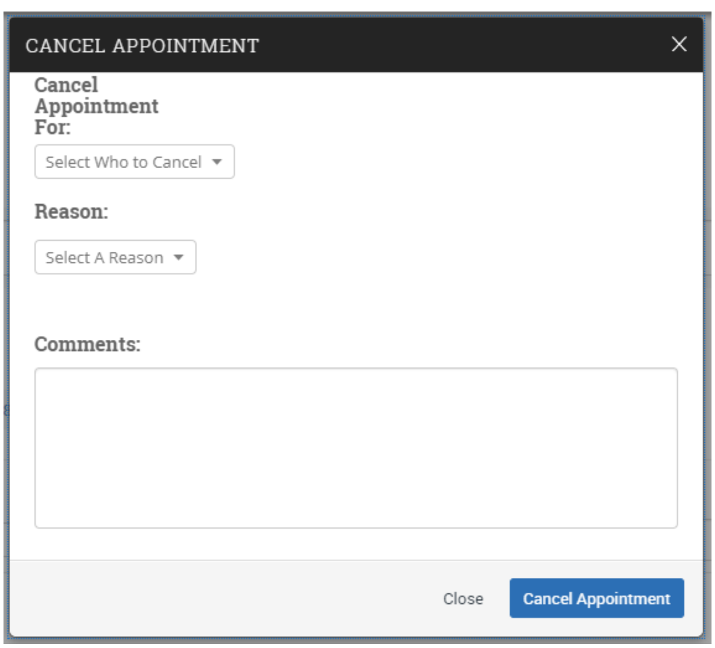
How to Cancel an Appointment

Appointment Center

1. Hover over the appointment you want to cancel on the Scheduling Grid. A snapshot of the appointment appears.
   Click Cancel.



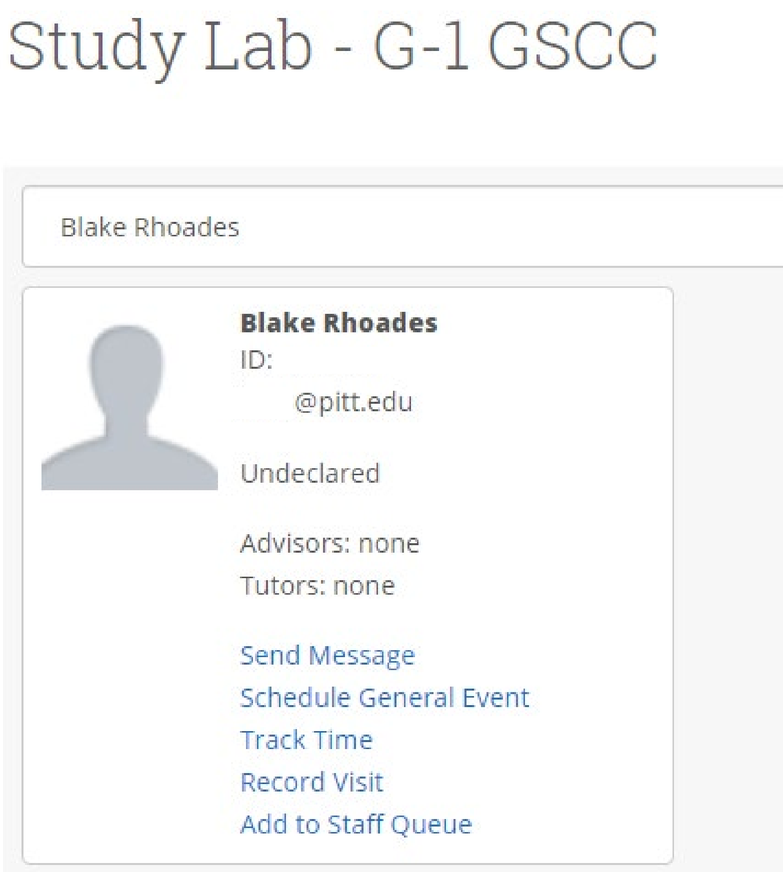
2. Select who wants to cancel the appointment and the reason for the cancelation from the drop down menus. Click Cancel Appointment.



How to Search for a Student

1. Under the name of the location, type the student's name into the box and hit enter.

2. After selecting the student, you will see limited information about that student and given a few action options.



3. The only information you have on a student is their PeopleSoft number, email, advisors, and major.

You will be able to Schedule a General Event which is an appointment.

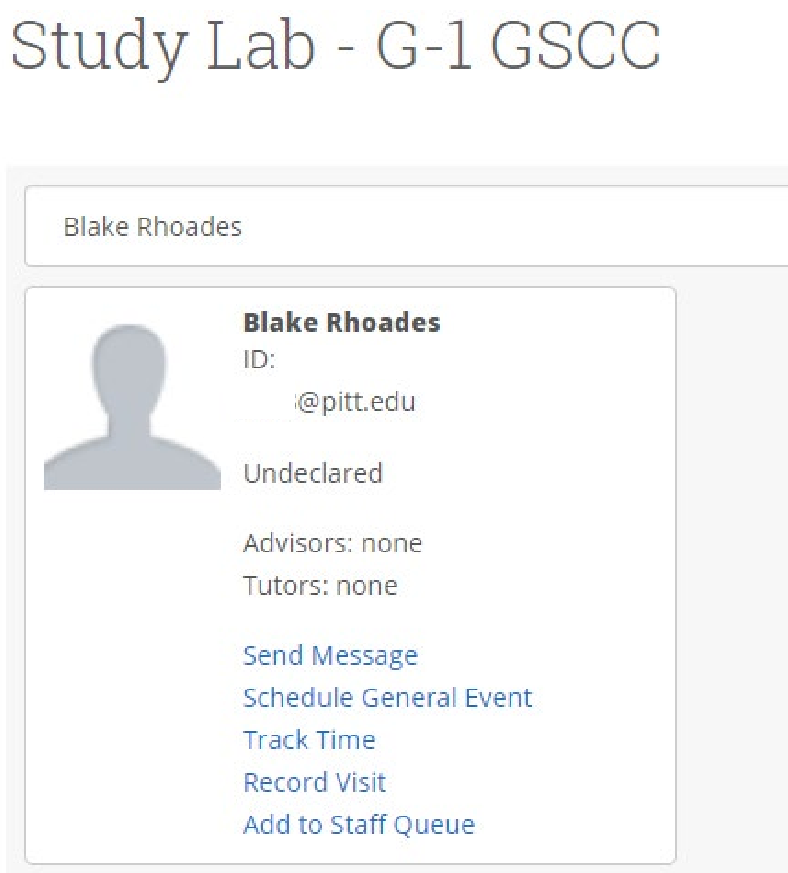
You will be able to send a message to the student.

You will be able to Add to Staff Queue which is a Drop In appointment.

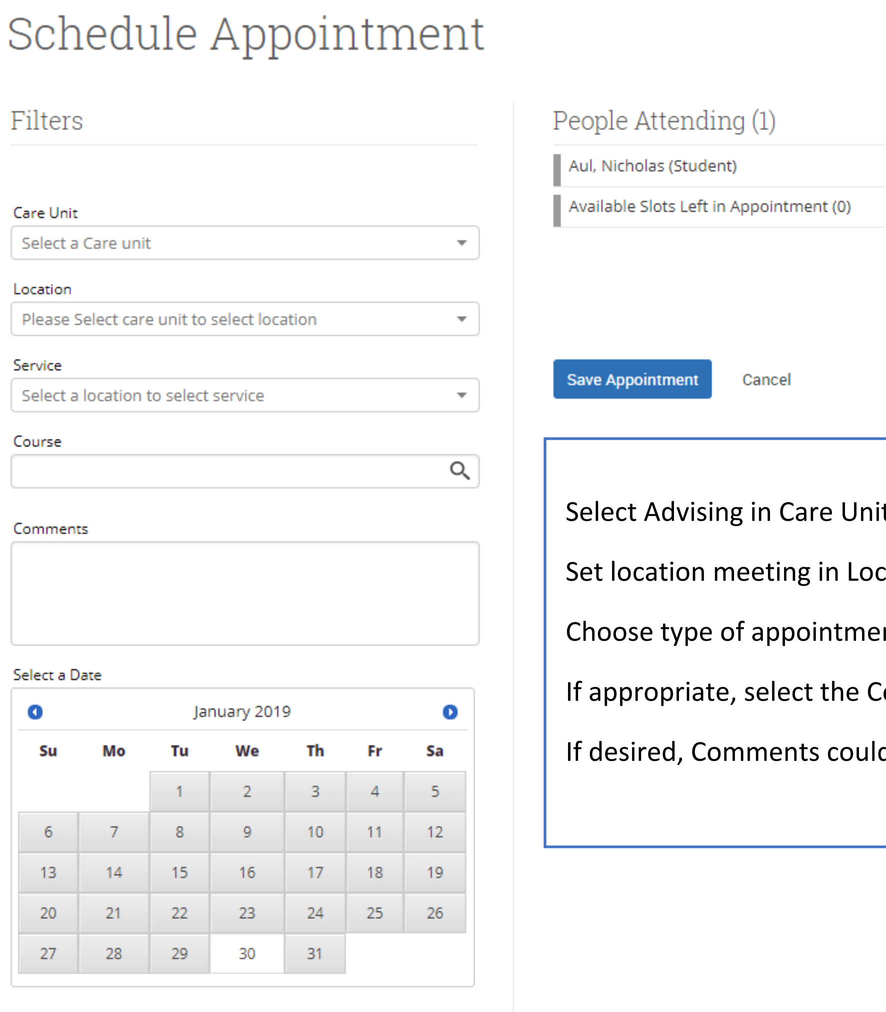
How to Schedule a General Event

1. Under the name of the location, type the student's name into the box and hit enter.

2. After selecting the student, click on Schedule a General Event.



3.



Select Advising in Care Unit

Set location meeting in Location

Choose type of appointment in Service

If appropriate, select the Course if needed

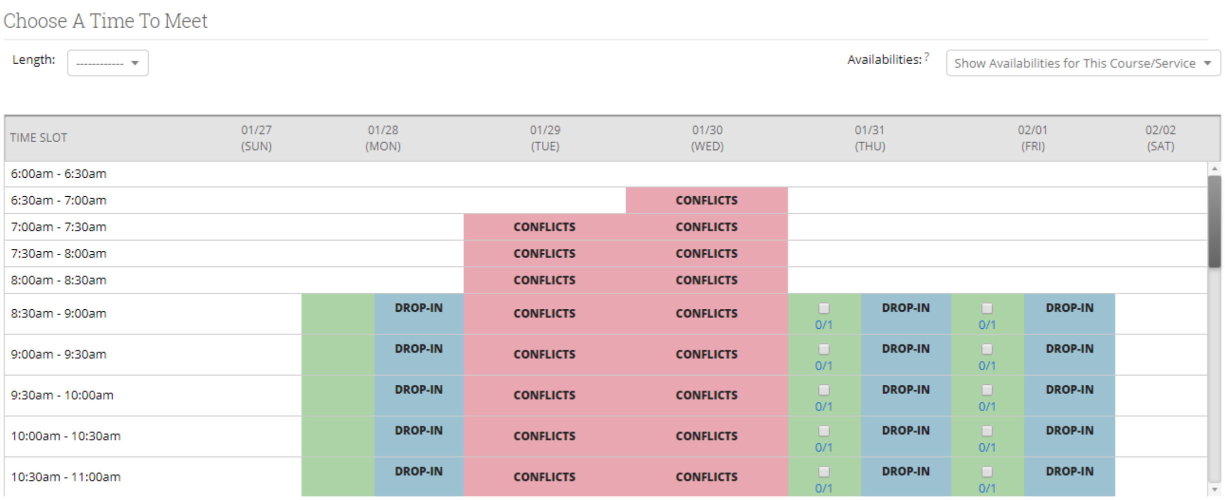
If desired, Comments could be added

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. If an appointment is available, that appointment will display with a small green box that will need to be checked to select it.



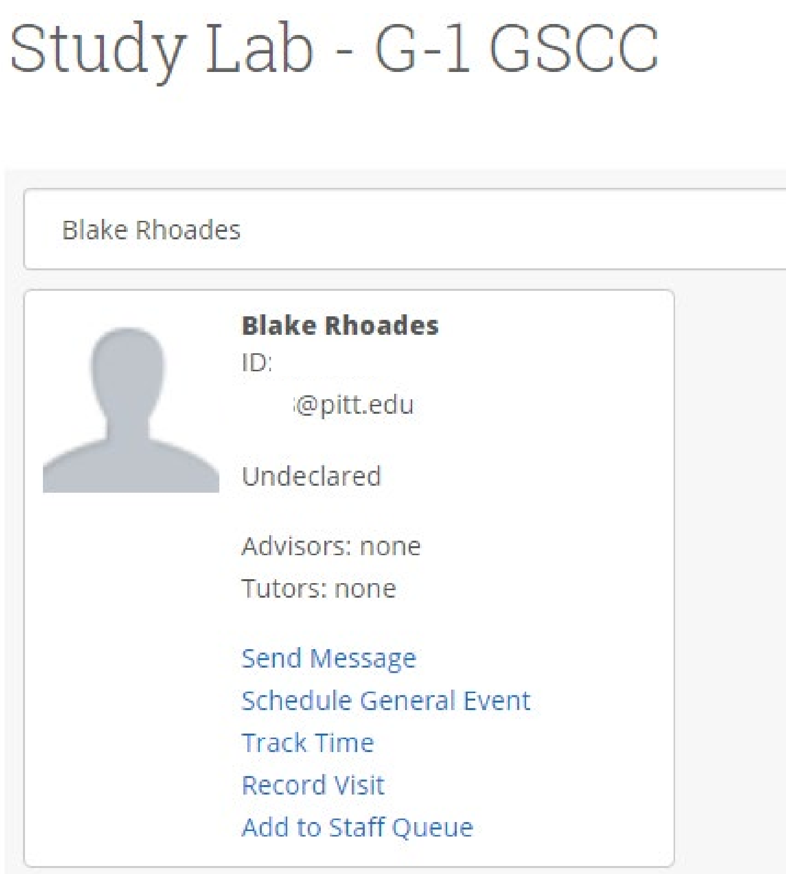
6. Click Save Appointment

How to Add a Student to a Staff Queue

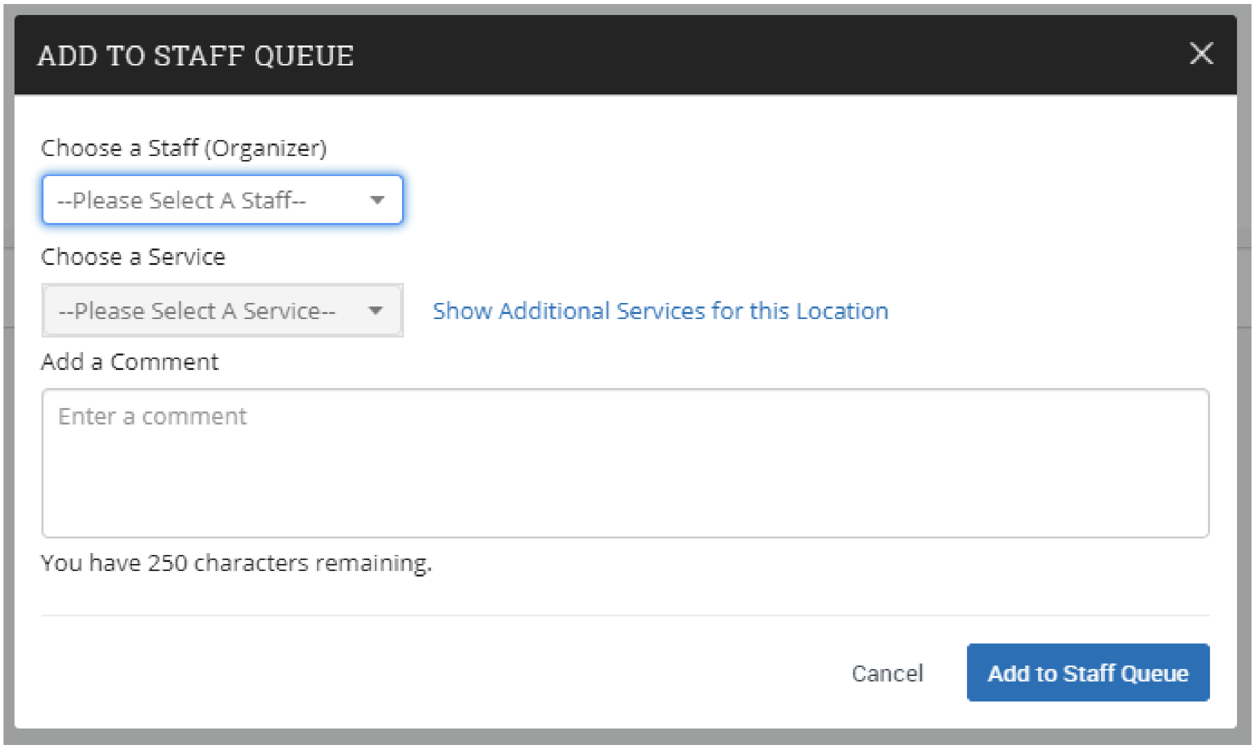
Drop In Appointments

1. Under the name of the location, type the student's name into the box and hit enter.

2. After selecting the student, click on Add to Staff Queue.



3. Select the Staff (Organizer) and the Service. You can also add a comment for the advisor. Once finished, click Add to Staff Queue. The student will be added to the staff member's queue and the staff member will be notified.



<u>Please note:</u> If Drop In hours are not currently happening, you cannot add a student to the advisor's queue.

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)

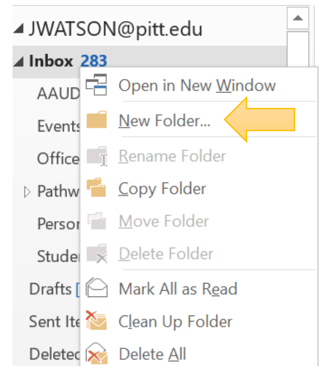
Location: Where advising or tutoring appointments occur

Service: Type of appointment

Alert: The name EAB gave to referrals

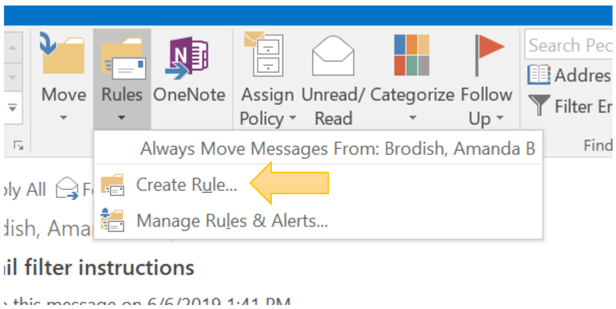
Case: Process of how a user manages referrals in Pathways

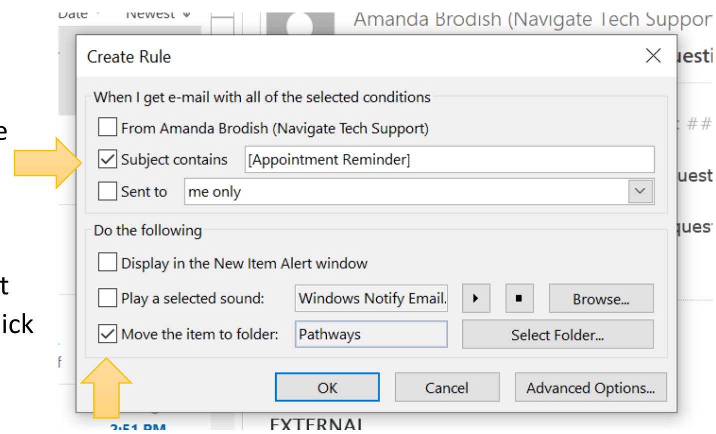
How to Create a Rule in Outlook for Appointment Reminder Emails



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

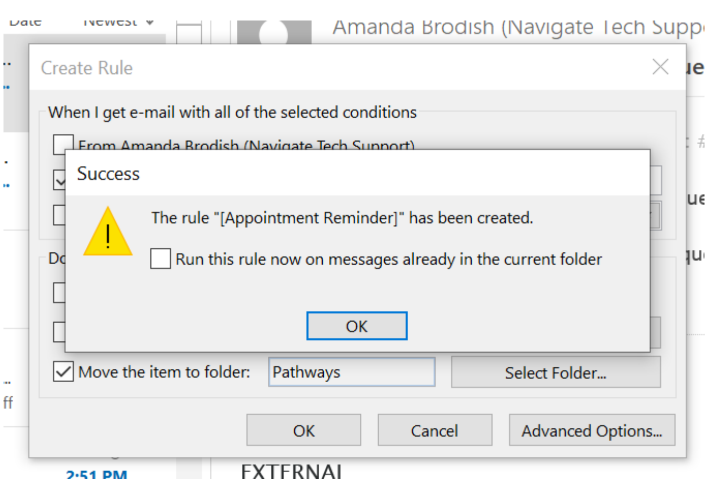
2. Highlight a message you would like to be included in the folder. Go to "Rules" and click "Create Rule".





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 .