

## EAB Navigate Quick Guide for Advisors: *Viewing Progress Reports, Alerts, & Cases*

Access the Navigate icon in the **AccessUH** portal.

EAB Navigate allows instructors to submit early alerts called Progress Reports for students who are at risk of not passing their courses. Academic advising offices can use these early alerts to monitor and support student performance.

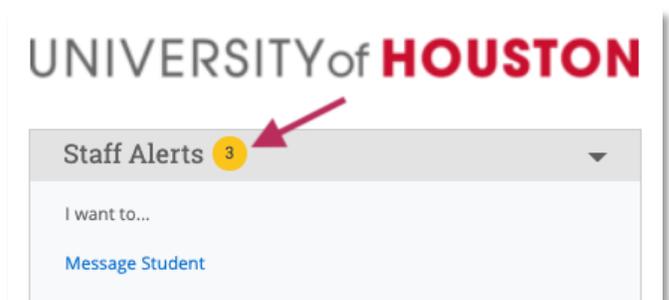
### About Progress Reports

- Instructors are encouraged to reach out to students first to offer assistance through normal means, and to submit Progress Reports for those who have either not responded or not shown improvement and are now at risk of not passing the course.
- Instructors are also encouraged to consider **when** and **for what purpose** they are submitting a Progress Report, with awareness of the semester calendar, including drop deadlines, so that students have ample time to take action to achieve intended outcomes.
- When a **Progress Report** is submitted, it then generates an **Alert** so that an email with detailed information can be sent to the student, and if it is a Progress Report that we want to follow in order to make referrals, it can also be set to open a **Case**.
  - Alert Reasons labeled **ACTION NEEDED** will direct students to take action on their own (e.g., to seek tutoring now).
  - Alert Reasons labeled **REFERRAL** will invite students to make an appointment with the Undergraduate Student Success Center (USSC) or fill out an online Challenge Identification self-assessment to receive assistance online. A REFERRAL Alert Reason will automatically open a "Case", which allows us to track our assistance to this student. When a student has responded to the USSC and met or communicated online, USSC staff will create an Academic Success Plan (ASP), and then close the Case.

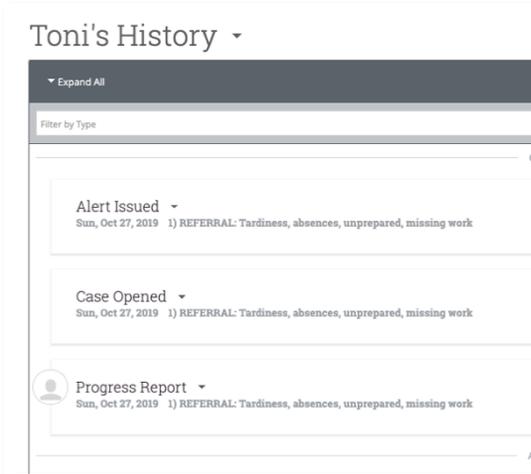
### How Advising offices can view Progress Reports, Alerts and/or Cases

#### For Individual Students

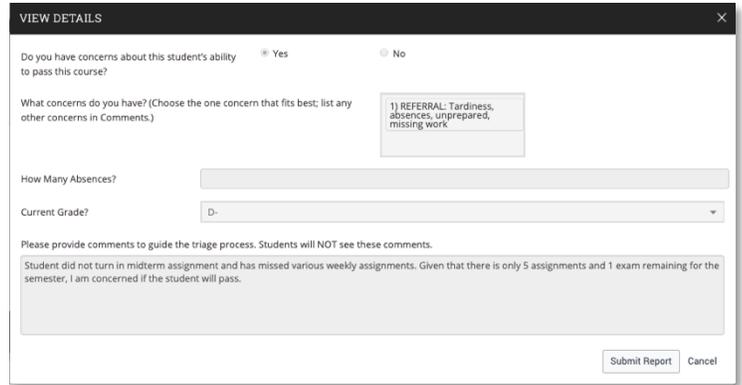
To view a count of Progress Reports, Alerts and/or Cases for a particular student, see the yellow circle next to **Staff Alerts** in the top right corner of a student's profile page. It's a good practice to be in the habit of checking that yellow circle whenever you meet with a student. Click the down arrow to see specific counts. However, this number can be misleading – remember, when a **Progress Report** is submitted, it then generates an **Alert**, and some Alerts are set to open a **Case**. In this counter, each one of these items are counted separately, so this single event could show a count of 3 in the yellow circle.



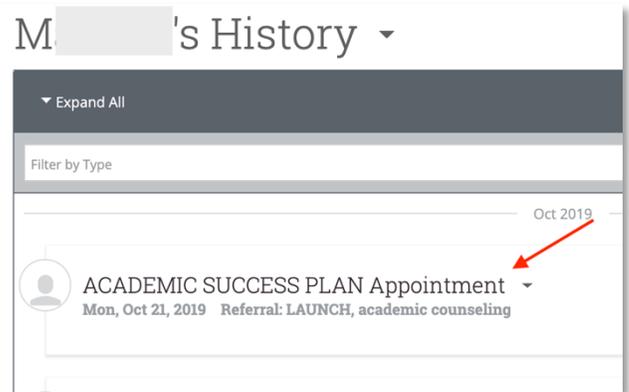
To see the Progress Reports, Alerts, and Cases, click on the item in the drop-down, or you can also click the History tab.



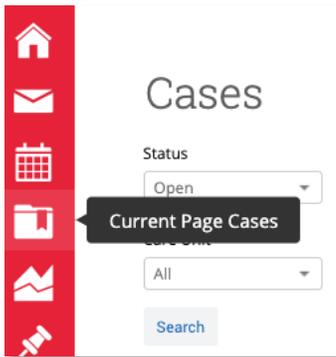
Click **View Details** to see the Alert Reason and the Comments given by the instructor. Note that students see the Alert Reason in their email but DO NOT the Comments.



USSC staff will use the Appointment Summary Report template to create an **Academic Success Plan (ASP)** so that advisors will have access to details and referrals on the student's History tab. ASPs will appear in the History with the Care Unit "ACADEMIC SUCCESS PLAN Appointment," with the capital letters making this tool stand out from other appointments. (the "Appointment" designation is hard-coded into the report feature, so cannot be removed.)



**For groups of students**



Academic advising offices can use these early alerts to monitor and support their student performance.

- Use the **Appointment Summaries Report** to run a list of ASPs and any referrals by date range for students in a particular Area of Study.
- Use **the Cases icon** on the left red navigation bar to see open Cases for those students who have not yet responded. Once the student responds and the ASP is created, USSC staff will close the Case.

Find additional resources here: <http://www.uh.edu/ussc/navigate/>  
 Need help? Email [navigate@uh.edu](mailto:navigate@uh.edu)