

EAB Navigate Guidance: *Assigning student advisors*

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

Students can be assigned to one or more academic advisors in Navigate. When advisors are assigned:

- The assigned advisor shows up for the student in the Navigate app with a star next to the name, so students will know they are making an appointment with their advisor.
- An advisor's caseload is displayed on their Navigate home screen in the "My Assigned Students" grid, for easy viewing and messaging of their cohort of students.
- An advisor can use the MyDashboard feature to see activity analytics on their caseload.
- In Advanced Search, multiple search filters can be layered onto the group of students assigned to an advisor by using the filter, "My Students Only."
- If a student receives a Progress Report, the assigned advisor will be sent a copy.
- An advisor's assigned students can be used to send an Appointment Campaign.

This document gives directions for assigning advisors in Navigate.

Identify the students

Click the "Administration" icon on the lower end of the left navigation bar and select "Mass Edit of Students."

There are multiple ways to select students to assign to an advisor:

- If you have the EMPLIDs for a group of students, you can simply copy those IDs and paste into the "Enter Keywords" box.
- Switch to Advanced Search to select the specific criteria that will be used to identify the group of students.
- In Advanced Search, select an existing Student List.

Any method of selecting the list of students will result in a static list of names for assignment that will need to be updated, such as for each term, or as student or advisor status changes. For a dynamic assignment for all of a major or all of a category, contact Melissa Pierson at mpierson@uh.edu.

Assign the advisor

Students can be assigned to one or more academic advisors.

- Click the boxes in front of the student names to select, or click the box at the top to Select All.
- From the gray tabs under the Search button, select "Assign to Someone."
- The option "Add to..." is selected as the default option.
- For Relationship, select Advisor.
- For Staff, select the Advisor name. Note that this field is case sensitive, so type the name with capital first letters.
- Click Save this Setting.
- If you need to remove an advisor assignment, select students who are assigned to that advisor and use the "Remove from" option.

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