

# How to Create and Use Student Support Lists

## Guidance for UM advisors on identifying students with concerning predicted support levels

**Context:** this document provides guidance for primary advisors (i.e. assigned based on students' declared majors) on creating saved searches and associated lists of students who have been identified by the Navigate predictive model as needing additional support. These saved searches and lists can be used for student tracking and targeted communication purposes.

Download Support Lists for Moderate/High Support

Review Student Lists

Upload to Navigate as Student List

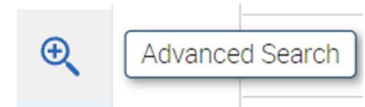
Use Support List with UM Advisor Communication and Support Plan

## Download your Support List for Mod/High Support

### GENERATE A SAVED SEARCH IN NAVIGATE

1. Login to Navigate and confirm that you are using your Staff Home role (if any other role such as Professor Home or Student Home appears on the Navigate home screen, use the drop down arrow next to the role to select Staff Home).

2. Click the Advanced Search icon from the menu on the left side of the screen.



3. Use the search filters to make the following selections:

- Under the Enrollment History search area, select the current or upcoming semester in the Enrollment Terms (In Any of these) field.
- Under the Success Indicators search area, select High Predicted Support Level and Moderate Predicted Support Level in the Predicted Support Level (In Any of these) field.
- Check the "My Students Only" box to the right of the Search button.
- Click Search at the bottom of the screen.

### New Search

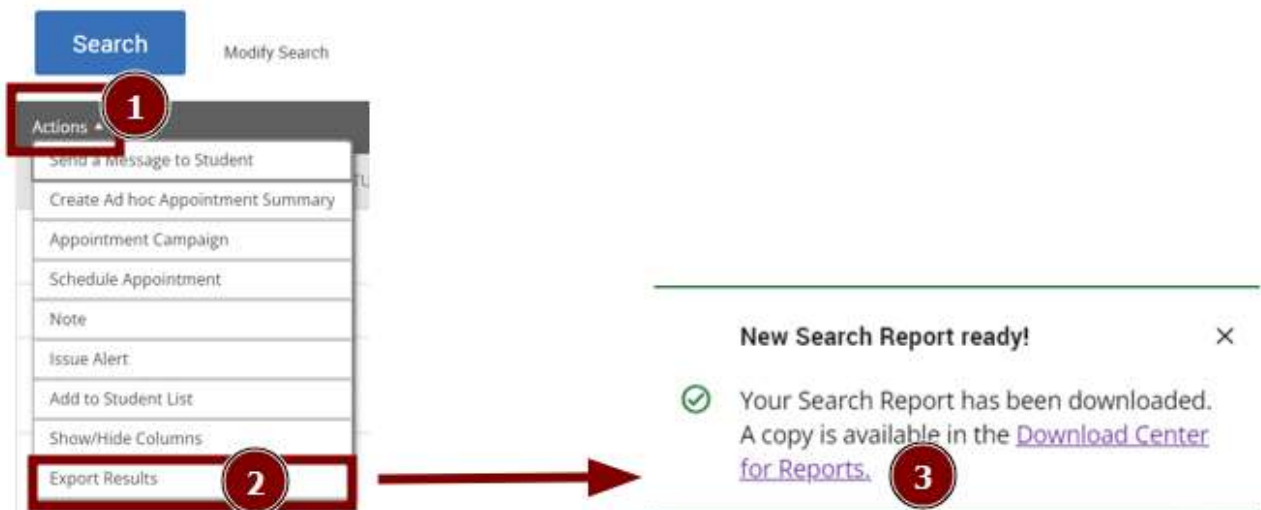
The screenshot shows the "New Search" interface in Navigate. It features several search filter sections: "Keywords (First Name, Last Name, E-mail, Student ID)", "Student Information", "Enrollment History", "Area of Study", "Term Data", "Performance Data", "Course Data", "Assigned To", "Goals & Interests", "Polls", and "Success Indicators". The "Enrollment History" section has a dropdown menu for "Enrollment Terms (In Any of these)" with "Fall 2022" selected, highlighted by a red box and a red circle with the number "1". The "Success Indicators" section has a dropdown menu for "Predicted Support Level (In Any of these)" with "High Predicted Support Level" and "Moderate Predicted Support Level" selected, highlighted by a red box and a red circle with the number "2". At the bottom, there is a "Search" button highlighted by a red box and a red circle with the number "4", and a checkbox for "My Students Only" which is checked, highlighted by a red box and a red circle with the number "3". There is also an "Include Inactive" checkbox which is unchecked.

## DOWNLOAD TO EXCEL

- A list of your assigned advisees with High and Moderate Predicted Support Levels will appear at the bottom of the Search screen. Click the check box immediately under the Actions drop-down menu to select all students on the list (depending on the number of students on the list, you may also need to click the Select all XXX items from the center of the screen below the Actions drop down – see screenshot below).



- Click the Actions drop down menu and select Export Results. A dialog box will appear titled Show/Hide Columns – select all columns of data you would like included in the exported list and click Export. When the export is complete, another dialog box will appear that states New Search Report ready! – click the link in the dialog box for Download Center for Reports as shown in screenshot on the following page. This will lead you to the Download Center for Reports and you will see the report you just exported listed. Click the name of the report and an Excel file will appear in your browser’s download indicator location – clicking the file from this location will open the list in Excel.




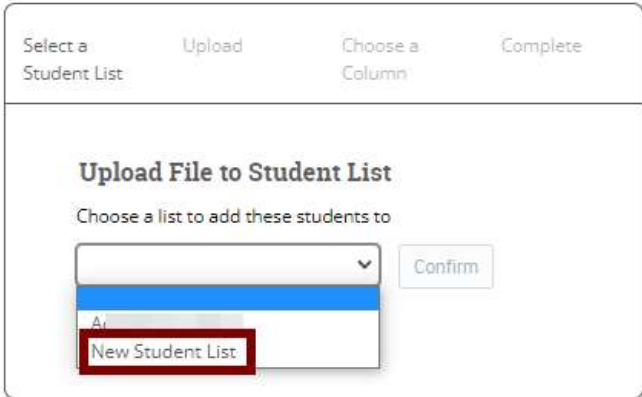
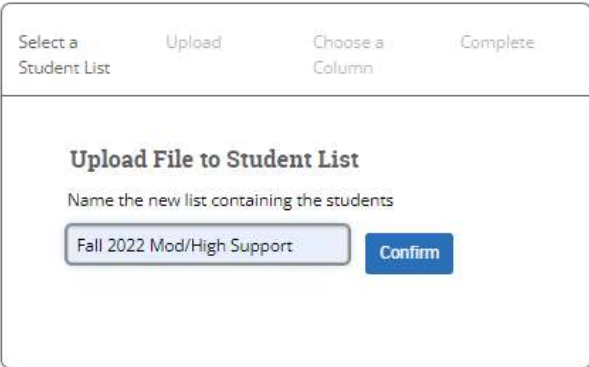
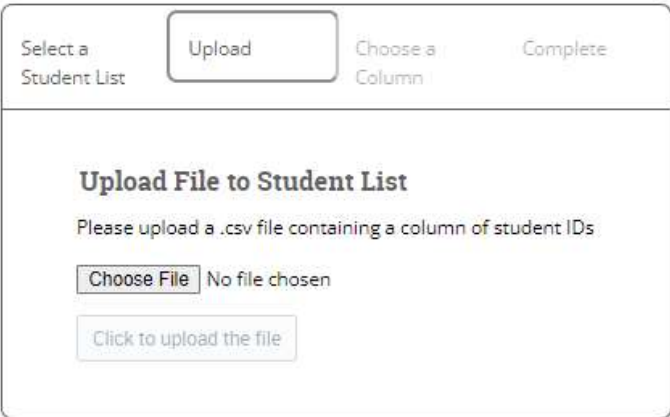
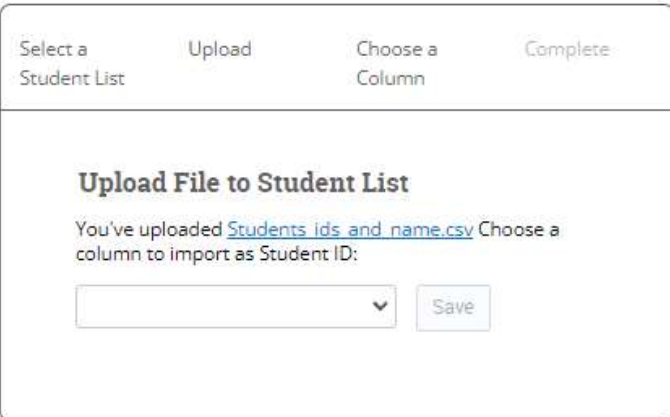
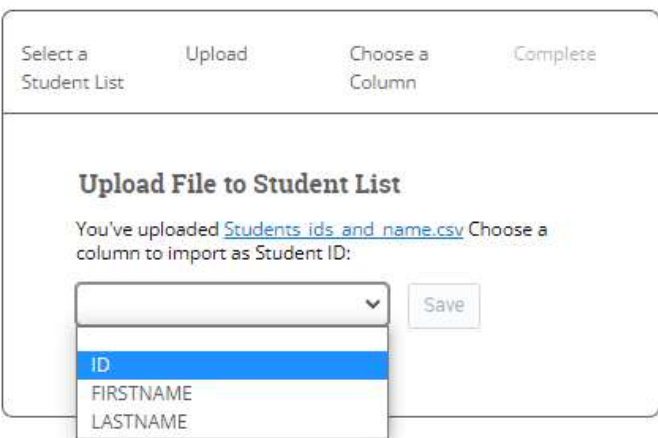
\*While exporting the list to Excel as previously described is the preferred approach, you can also save the list within Navigate.

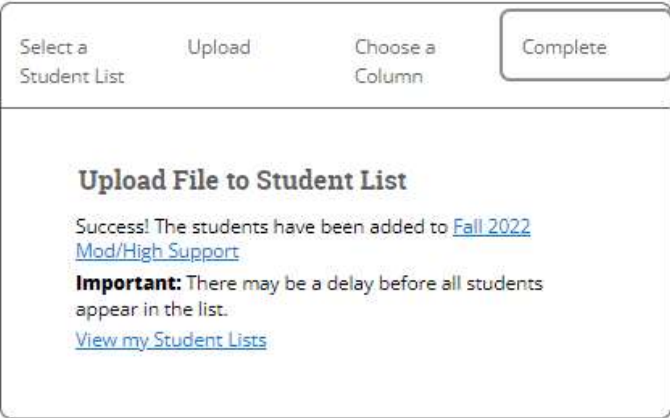
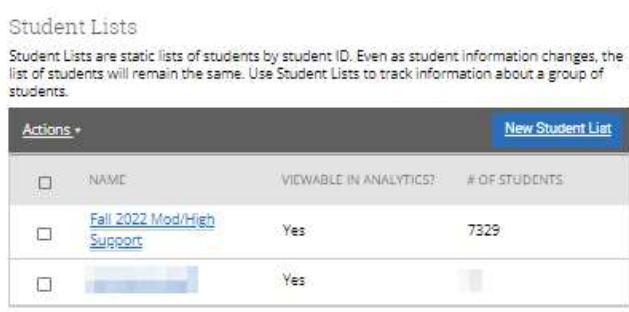
- Complete the steps above again and, on Step 3 under the Success Indicators search area, select Low Predicted Support Level in the Predicted Support Level (in any of these) field. Export the results from this additional search and follow the steps below to upload your Low Support and Mod/High Support lists into Navigate.

## Upload your Curated Support List to Navigate as a Student List

Save your support list as a csv and then log into Navigate. Go to the Lists and Saved Items screen.



Use Action menu to upload student list	Select "New Student List" to start a new list						
<p>Student Lists</p> <p>Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.</p>  <table border="1"><thead><tr><th>Actions</th><th>VIEWABLE IN ANALYTICS?</th><th># OF STUDENTS</th></tr></thead><tbody><tr><td><a href="#">Upload Student List</a></td><td>Yes</td><td>0</td></tr></tbody></table>	Actions	VIEWABLE IN ANALYTICS?	# OF STUDENTS	<a href="#">Upload Student List</a>	Yes	0	
Actions	VIEWABLE IN ANALYTICS?	# OF STUDENTS					
<a href="#">Upload Student List</a>	Yes	0					
Give the new list a name that includes the term	Choose the CSV file (not Excel) you want to upload						
							
You will be prompted to choose the ID column	Use the dropdown to pick the Student ID column						
							

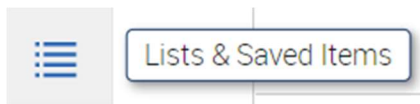
<p><b>A success message will let you know you are done</b></p>	<p><b>You can view your new list on the Lists home screen.</b></p>
	

### Use Student Support Lists with UM Advisor Communication Plan

**\*\*See the [UM Advisor Communication and Support Plan](#) document for guidance on recommended communications to send to students on your Predicted Support Level saved list.\*\***

\*\*\*Please keep in mind the Predictive Model-related resources available at <https://www.umt.edu/navigate/predictive-modeling/default.php>, especially the document developed by the Critical Advising Practices for Equity (CAPE) group on using predictive analytics ethically available at <https://www.umt.edu/navigate/for-advisors/predictive-analytics-responsibility-data-ethics>.\*\*\*

- Click the Lists & Saved Items icon from the menu on the left side of the screen (as shown in screenshot below)



- You should now see the new lists you just created, along with any other saved lists you have created. Select the new list by clicking on the list name. You will now be able to easily use this list for tracking and for targeted communications to students. Select all students on the list (again, you may need to also select the Select all XXX items as shown in the screenshot on item 4 above) and use the Actions drop down menu to perform various actions such as sending a message to the students.