USING ACADEMIC PLANNER IN NAVIGATE STAFF

Within **NIU Navigate Staff**, Advisors can view, comment on or add/recommend courses and plans to a student's academic plan developed within the student-facing Navigate module, **Navigate Student Academic Planner**.

Want to know more about the student functionality? Check out this video and student guide.

View a Student's Academic Plan in Navigate Staff

- ❑ Find or select a student to view from your **Staff Home** screen, and access the student's Navigate page.
- ❑ From the student's Navigate screen, click on the **Academic Plan** tab.

**Note**: A student will not see your work until you send the plan in the final step.

From the Academic Planner screen, you can Add a new term to plan, Add/recommend classes to a current or upcoming term, and Comment on plans. All of those features start by clicking **Create Plan**.

Action to Take	Select Option
Add a new term to planner. Add a class to a future term.	Create New Plan
Add a class to student's current plan. Comment on student's current plan.	Use Current Term

Add a New Term to Planner

- ❑ Select **Create New Plan** to add a new term to planner.
- ❑ Type a name for the plan into the pop-up box that appears (e.g., Fall 2023 Advisor Plan).
- ❑ Press **Continue**.
- ❑ Next, press the ☰ icon from the right-hand column.
- ❑ Click on **Add A Term** and select a term.
- ❑ The new term will appear just below the **Draft Plan**.

Note: Classes planned in Navigate Student Planner do _not_ appear in the student's MyNIU Shopping Cart, and Shopping Cart classes do not appear in Navigate Student Planner.
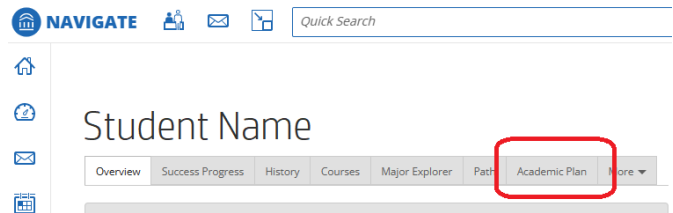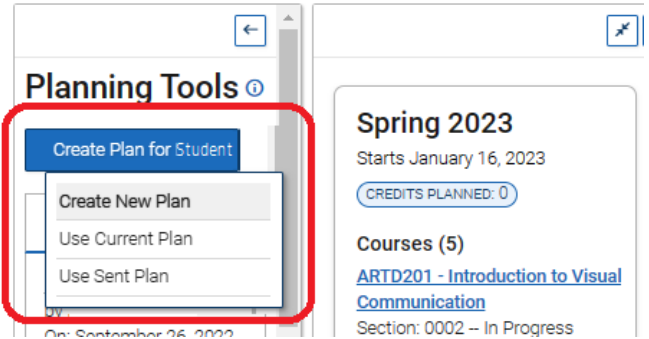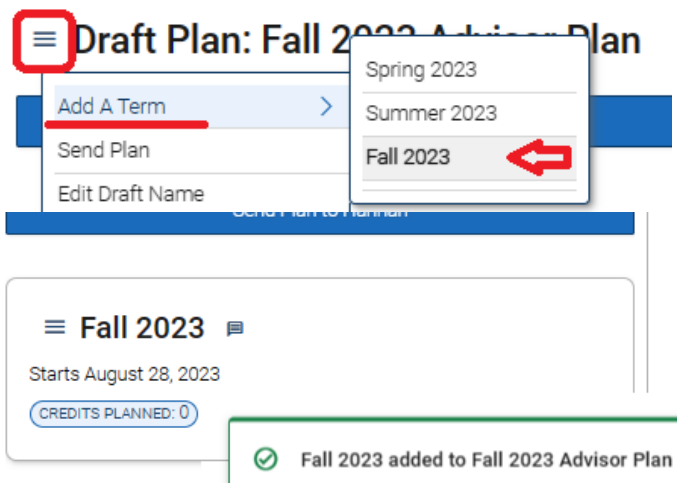
— Proceed to next page for adding classes to the plan. —

Add/Recommended Courses to a Current or New Term

- ❑ Click the **Course Catalog** link under Planning Tools.
- ❑ Next, click the **Search for Courses** link.
- ❑ Type into **Search by Keyword** the course prefix or full course and number in all caps without a spaces (e.g., ENGL103).
- ❑ Press the **Search** button and a valid result should appear.
- ❑ Click on the square next to the course in the search results.
- ❑ From the drop-down menu, select the term to which the class will be added, then press the **Add to Term** button.
- ❑ The class will appear in the list of planned courses for the term you selected.

At this point, the draft plan is saved automatically. Are you ready to send to student? **Note**: Sent plans cannot be edited.

- ❑ **No**: Click the **< Back to Student** link if you are not ready to send the draft to the student.
- ❑ **Yes**: Click the **Send Plan** button to share with the student to view. The student will be notified via email and in Navigate Student web portal that your plan for them has been sent.

Tip: To return to a **Draft Plan** to make changes or add more classes:
- ❑ Click on the link for the draft you created (located under **Planning Tools > Draft Advisor Plans**.
- ❑ Select the **Edit Draft** button at the top of the middle column. Then press the **Yes, Edit Draft Plans** button.

— See next page for additional information. —

Northern Illinois University
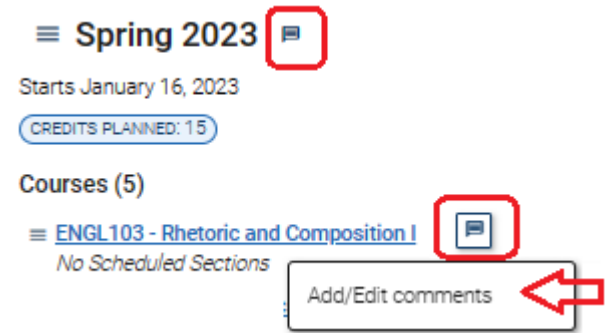
Post Comments in an Academic Plan for Students to Read

Advisors can post comments in the **Academic Plan** view (Navigate Staff) about specific courses. Comments appear both as an unread message notification in a student's Navigate Student portal and an icon will appear in the template slot next to that course.

- ❑ Select **Create New Plan** to add a new term to planner.
- ❑ Select **Use current plan**.
- ❑ Type a name for the plan into the pop-up box that appears (e.g., Advisor comments for fall 2023).
- ❑ Press **Continue**.
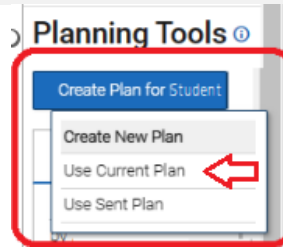
- ❑ In the **Draft Plan** column, an 🗨 icon will display next to the term name and next to each course.
- ❑ Click the dialog bubble icon and **Add/Edit comments** to type a comment to the student about the class or term.
- ❑ Type your comments into the text box that appears, and then press **Save**.

At this point, the draft plan is saved automatically. Are you ready to send to student? **Note**: Sent plans cannot be edited.

- ❑ **No**: Click the **< Back to Student** link if you are not ready to send the draft to the student.
- ❑ **Yes**: Click the **Send Plan** button to share with the student to view. The student will be notified via email and in Navigate Student web portal that your plan for them has been sent.
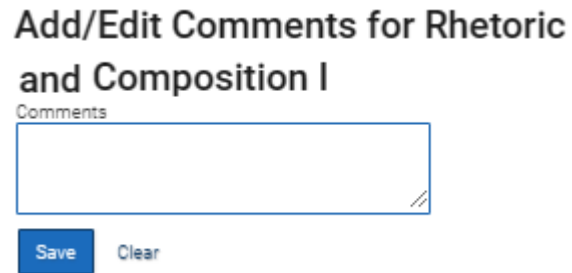
Tip: To return to a **Draft Plan** to make changes or add more classes:
- ❑ Click on the link for the draft you created (located under **Planning Tools > Draft Advisor Plans**).
- ❑ Select the **Edit Draft** button at the top of the middle column. Then press the **Yes, Edit Draft Plans** button.

IMPORTANT: Courses planned in Navigate Student Academic Planning System are <u>not</u> displayed in MyNIU Shopping Cart.