



Advisor Introduction

Created: July 2025

Navigate360 – Advisor Introduction

- Navigate360 is USC Upstate's student success platform to connect faculty, advisors, and staff with students
- With Navigate360 you can:
 - Manage appointment availability
 - Sync your Navigate360 and Outlook Calendars
 - View student profiles, academic history, etc.
 - Document advising appointments and other interactions
 - Issue alerts

Navigate360 – Logging Into Navigate360 Staff Account

- You can access Navigate360 at <https://uscupstate.campus.eab.com/>

UPSTATE
University of South Carolina

Sign in

Full USC Upstate Email Address

[Can't access your account?](#)

Next

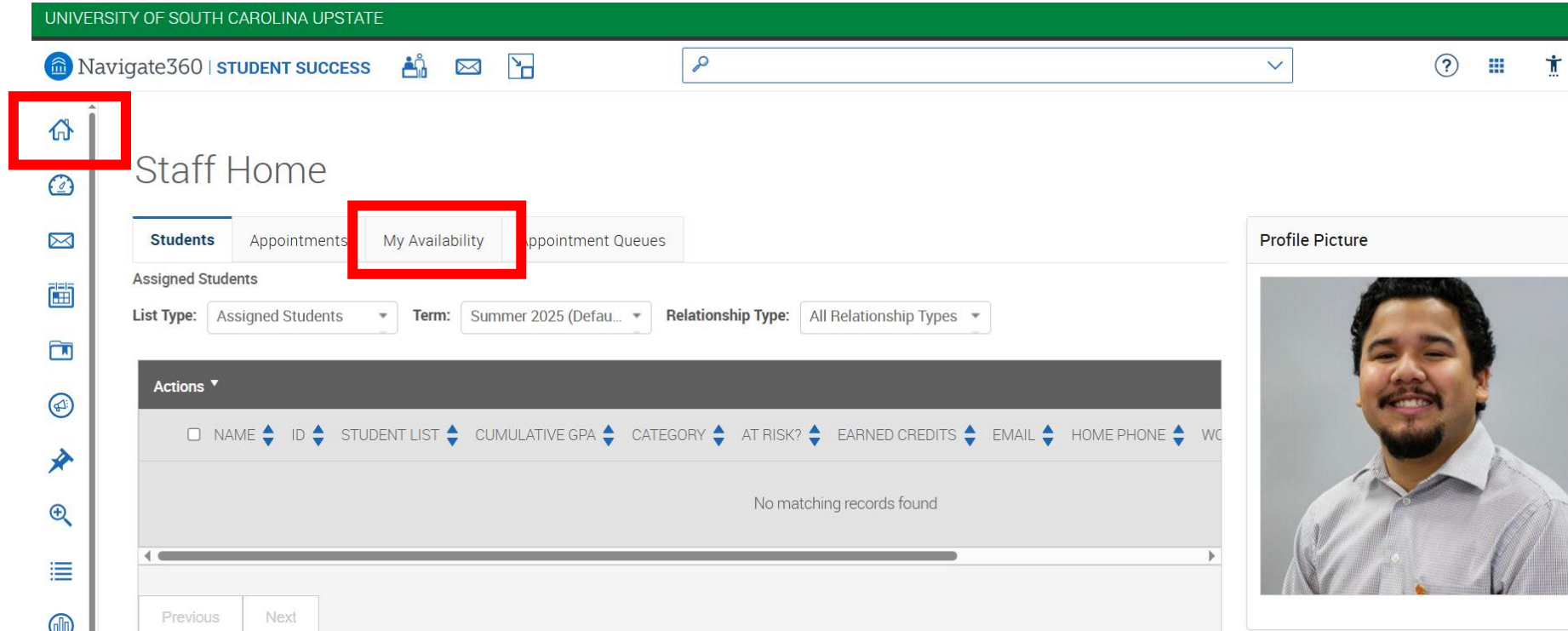
Password restrictions: At least eight characters and must meet the following: One or more lowercase and uppercase alphabetic characters (a-z) (A-Z) One or more numeric characters (0-9) One or more special characters (!@#\$%^&*~+ =)

Sign-in options

Login using your USC Upstate email address and password

- Staff only have access to Navigate360 on desktop; the mobile app is intended for the student experience

Creating and Managing Appointment Availability



1. Click on the Home icon on the left-hand side to access the **Staff Home** page
2. Click on **My Availability** to open the availability table

Creating and Managing Appointment Availability

The screenshot shows the 'Staff Home' interface of the University of South Carolina Upstate's Navigate360 system. The top navigation bar includes the university name, 'Navigate360 | STUDENT SUCCESS', and various utility icons. The main content area has tabs for 'Students', 'Appointments', 'My Availability' (selected), and 'Appointment Queues'. Under the 'My Availability' tab, there is a section titled 'Available Times' which contains a table with columns: TIMES, DATES, LOCATION, PURPOSE, CARE UNIT, PERSONAL LINK, and MEETING TYPE. A red box highlights the 'Actions' dropdown menu, which includes 'Add Time', 'Copy Time', and 'Delete Time'. To the right of the table, there is a 'Profile Picture' section showing a photo of a man. At the bottom of the table area, a message states: 'No available times have been listed. To add a time, click the "Add Time" button.'

3. Click on **Actions**, then select **Add Time**

Creating and Managing Appointment Availability

ADD AVAILABILITY

When are you available to meet?

Mon Tue **Wed** Thu Fri Sat Sun

From 9:30am To 12:00pm

All times listed are in Eastern Time (US & Canada).

How long is this availability active?

A Range of Dates

Starting on 07/01/2025 Ending on 07/31/2025

Add to your personal availability link?

☒ Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

☒ Virtual ☒ In-Person

4. Select the days you are available, enter the start and end times for each block, and choose a date range for how long the availability should remain active

*We recommend checking the “**Add this availability to your personal availability link**” so it appears on your shared scheduling link. You can then share this link with advisees for quick and easy appointment scheduling*

5. Select **Appointments** as the availability type, then choose **Virtual**, **In-Person**, or both for your meeting type

Creating and Managing Appointment Availability

Care Unit

Advising Care Unit

Location

Advisor's Office/Virtual Link

Services

✕ 30 Minute Advising Appointment

✕ 60 Minute Advising Appointment

URL / Phone Number

<https://sc-edu.zoom.us/j/88347513595>

Special Instructions for Student

B *I* | |

For in-person appointments, visit my office, Library 203.

For virtual appointments access the Zoom meeting link provided below:

<https://sc-edu.zoom.us/j/88347513595>

Access the meeting some minutes before our start time, and I will let you into the meeting once we are set to begin.

6. Select the appropriate **Care Unit**, **Location**, and **Service** for the availability you are creating
7. Paste your virtual meeting link in the **URL / Phone Number** field if offering virtual appointments
8. Use the **Special Instructions for Student** field to provide any additional context

This is a great place to include directions for finding your office on campus and to re-paste your virtual meeting link for added clarity and redundancy

Navigate360 – Calendar Sync

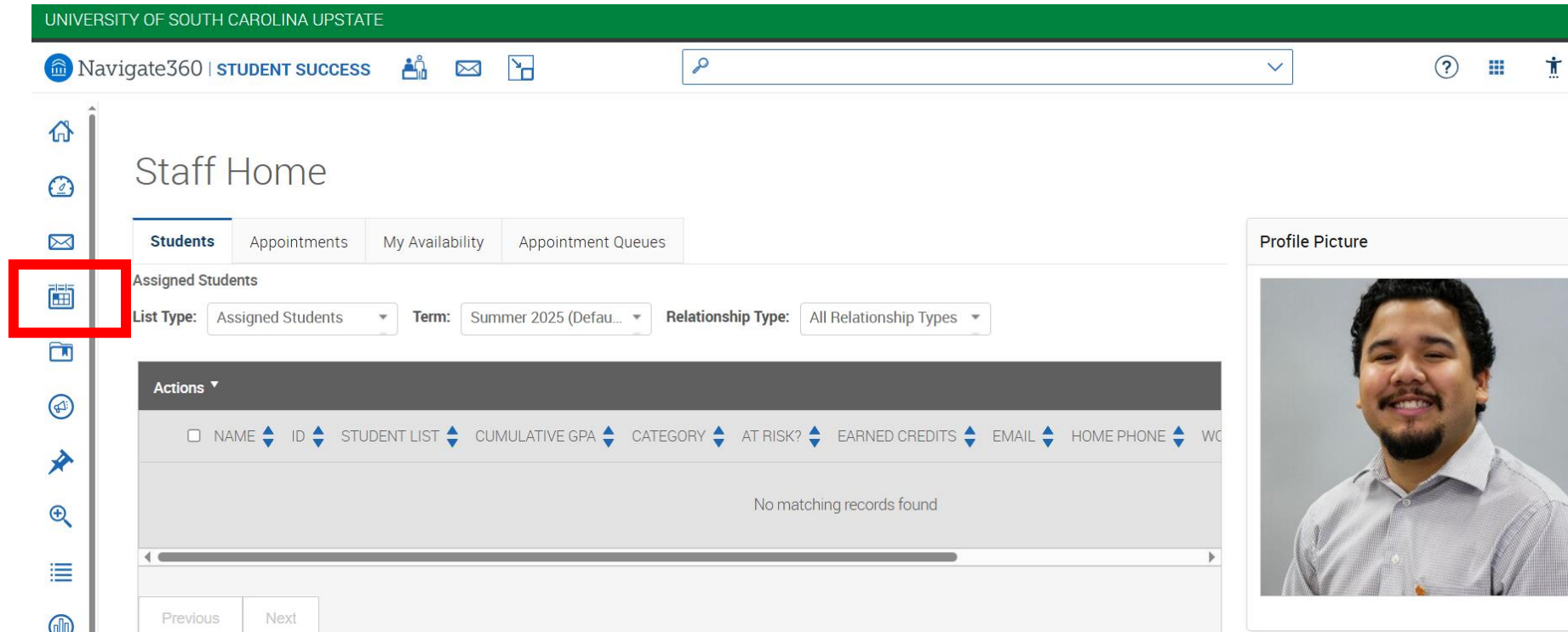
- Navigate360 can sync with your Outlook calendar so that Busy times on Outlook are reflected on Navigate360 and you can avoid double booking

**Calendar sync does not display your Navigate360 appointment*

availability in Outlook, calendar sync blocks times when you are busy

on Outlook so students on Navigate360 are unable to book over them

Enabling Calendar Sync



1. Click on the **Calendar** icon on the left-hand side to access the **Calendar** page

Enabling Calendar Sync

UNIVERSITY OF SOUTH CAROLINA UPSTATE

Navigate360 | STUDENT SUCCESS

My Calendar

Calendar View | List of Calendar Items

[Settings and Sync](#)

The calendar view is a graphical representation of the calendar. If you need a **fully accessible** interface, please use the list of calendar items view here: [List of Calendar Items](#).

Checking/unchecking the legend boxes will show/hide corresponding events on the calendar

☒ Course ☒ Assignment ☒ General ☒ Busy ☒ Cancelled ☒ School Wide Event ☒ Event Rsvp

*All times listed are in Eastern Time (US & Canada).

Print Calendar (PDF) Add +

June 2025

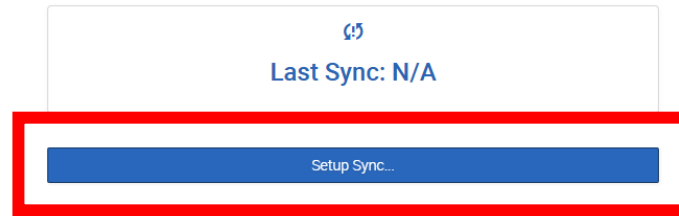
today day week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14

2. Click on the **Settings and Sync** button on the right-hand side

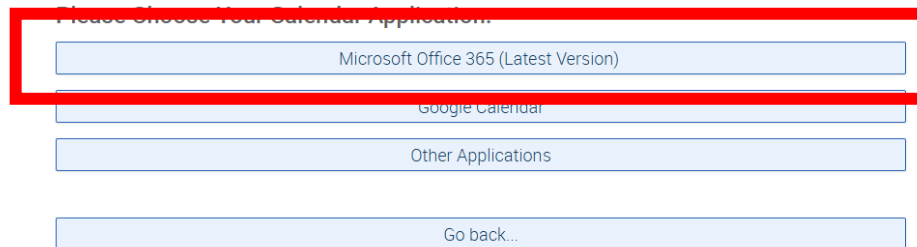
Enabling Calendar Sync

Calendar Settings



3. Click the **Setup Sync** button

Calendar Settings: Setup



4. Select **Microsoft Office 365 (Latest Version)**

5. If prompted, enter your USC Upstate credentials to allow the integration

Navigate360 – Appointment Summaries

- After meeting with a student, advisors and faculty should document the interaction using an appointment summary in Navigate360
- Appointment summaries ensure important details, follow-up instructions, and student needs are documented

Creating Appointment Summaries

UNIVERSITY OF SOUTH CAROLINA UPSTATE

Navigate360 | STUDENT SUCCESS

Staff Home ▾

Students Appointments My Availability Appointment Queues Appointment Requests

Assigned Students

List Type: Assigned Students Term: Summer 2025 (Default) Relationship Type: All Relationship Types

Actions ▾

<input type="checkbox"/>	NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY	AT RISK?	EARNED CREDITS	EMAIL	HOME PHONE	WORK PHONE	CELL PHONE	ADDRESS
No matching records found												

Previous Next

0 total results

Profile Picture

Actions

I want to...

[Issue an Alert](#)

[Upload Profile Picture](#)

1. Click on the **Appointments** tab

Creating Appointment Summaries

UNIVERSITY OF SOUTH CAROLINA UPSTATE

Navigate360 | STUDENT SUCCESS

Students **Appointments** My Availability Appointment Queues Appointment Requests

Upcoming Appointments

Care Unit: All Care Units

Actions Show Cancelled

	DATE/TIME	ATTENDEE	SERVICE	COMMENT	MEETING TYPE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
This user has no upcoming appointments.								

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All Care Units

Actions Show Cancelled

	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
<input type="checkbox"/>	06/04/2025 10:00am - 10:30am ET (30m)	SOAR Appointment	N/A		Rose, Alex	Not Yet.	Details	N/A

2. In the **Recent Appointments** table, select the appoint you want to document
3. Click the **Actions** button, then select **Add Appointment Summary**

Recent Appointments

Care Unit: All Care Units

Actions Show Cancelled

- Add Appointment Summary
- Mark As Show
- Issue Alert

Creating Appointment Summaries

APPOINTMENT REPORT FOR ALEX ROSE ✕

Appointment Details
SOAR Appointment
06/04/2025 10:00am - 10:30am ET

Care Unit

Advising Care Unit

Location

Advisor's Office/Virtual Link

Service

SOAR APPOINTMENT

Select Service

Course

Start typing to search all courses

Meeting Type

VIRTUAL

Select Meeting Type

Date of visit

06/04/2025

Meeting Start Time


10:00am

Meeting End Time

10:30am

All times listed are in Eastern Time (US & Canada).

Attendees

 **Axel Ruiz**
Administration, Advisor, Student, Super User

Summary Details For Alex Rose
Reason for Visit

Next Steps/Follow-Up Items for Student

Follow-Up Items for Advisor

We discussed the student dropping or withdrawing from a course.

☐ Yes ☐ No ☐ N/A

We discussed concerns about the student's grades.

☐ Yes ☐ No ☐ N/A

We discussed the student's career goals and/or internship opportunities.

☐ Yes ☐ No ☐ N/A

We discussed financial concerns that may impact the student's academic success.

☐ Yes ☐ No ☐ N/A


































We discussed whether all transfer credit appears on the student's transcript.

☐ Yes ☐ No ☐ N/A


We discussed technology issues that may affect the student's ability to succeed.

☐ Yes ☐ No ☐ N/A

Advising Appointment Summary

Paragraph **B** **I**                                 

Attachments

 Attach File

Choose File

 No file chosen

Privacy
Student(s) can see this report.

Report Information
Created By: Axel Ruiz on 06/04/2025 10:53am ET

- Ensure all the correct selections are made for **Care Unit, Location, Service, Course** (if it applies), **Meeting Type, Date, and Meeting Start/End Time**
- Complete the report by filling out the provided text fields with relevant details, and respond to all **Yes/No/N/A** questions
- Click **Save** when you have completed the report

Navigate360 – Issuing Alerts

- Staff have access to **Issue Alerts** on Navigate360
 - This essentially replaces flags, kudos, and referrals previously used in Starfish
- Some alerts will open a **Case** in Navigate360
 - Cases allow staff to actively manage documentation, follow-up instructions, and resolution in reference to the specific alert reason

Issuing Alerts

The screenshot shows the 'Staff Home' page of the University of South Carolina Upstate's Navigate360 system. The page has a green header with the university's name and a navigation bar with icons for home, mail, and calendar. The main content area is titled 'Staff Home' and includes tabs for 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. The 'Students' tab is active, showing the 'Assigned Students' section. This section has filters for 'List Type' (Assigned Students), 'Term' (Summer 2025), and 'Relationship Type' (All Relationship Types). Below the filters is a table with columns for NAME, ID, STUDENT LIST, CUMULATIVE GPA, CATEGORY, AT RISK?, EARNED CREDITS, EMAIL, HOME PHONE, WORK PHONE, CELL PHONE, and ADDRESS. The table is currently empty, displaying 'No matching records found'. To the right of the table is a 'Profile Picture' section showing a photo of a man. Below the photo is an 'Actions' section with the text 'I want to...' and two links: 'Issue an Alert' and 'Upload Profile Picture'. The 'Actions' section is highlighted with a red border.

UNIVERSITY OF SOUTH CAROLINA UPSTATE

Navigate360 | STUDENT SUCCESS

Staff Home ▾

Students | Appointments | My Availability | Appointment Queues | Appointment Requests

Assigned Students

List Type: Assigned Students Term: Summer 2025 (Default) Relationship Type: All Relationship Types

Actions ▾

<input type="checkbox"/>	NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY	AT RISK?	EARNED CREDITS	EMAIL	HOME PHONE	WORK PHONE	CELL PHONE	ADDRESS
No matching records found												

Previous Next

0 total results

Profile Picture

Actions

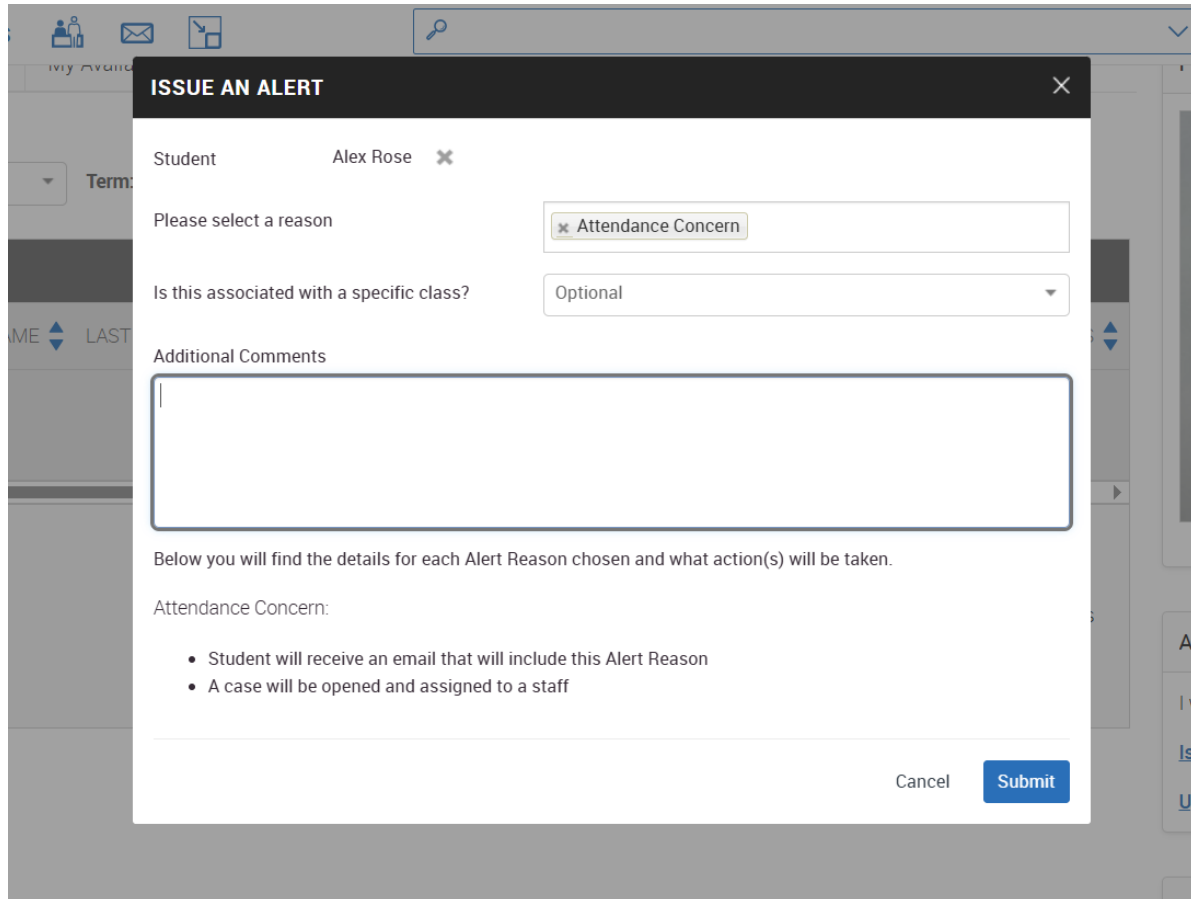
I want to...

[Issue an Alert](#)

[Upload Profile Picture](#)

1. From the **Staff Home** page, select **Issue an Alert** under the **Actions** options

Issuing Alerts



The screenshot shows a web application interface with a modal window titled "ISSUE AN ALERT". The modal is overlaid on a background that appears to be a student profile or a list of students. The modal contains the following elements:

- Student:** Alex Rose (with a close icon).
- Please select a reason:** A dropdown menu with "Attendance Concern" selected.
- Is this associated with a specific class?:** A dropdown menu with "Optional" selected.
- Additional Comments:** A large text area for entering comments.
- Below you will find the details for each Alert Reason chosen and what action(s) will be taken.**
- Attendance Concern:**
 - Student will receive an email that will include this Alert Reason
 - A case will be opened and assigned to a staff
- Buttons:** "Cancel" and "Submit".

2. Select an **Alert Reason** from the dropdown options

Associating the alert with a specific class is optional, but will provide further context for course specific alerts

3. Provide additional comments and submit

Navigate360 – Advisor FAQs

Q: I have enabled calendar sync, but I am not seeing my created Navigate360 appointment availability on Outlook?

A: Navigate360 will only send scheduled appointments to your Outlook calendar as holds, not your availability windows

Q: Can I see all students in Navigate360?

A: You will only see students assigned to you, enrolled in your course, or otherwise connected to your role

Navigate360 – Advisor FAQs

Q: Do I have to write an Appointment Summary for every meeting?

A: Yes, documenting your interactions ensures students receive consistent support and helps us track advising and faculty engagement

Q: What happens when I issue an Alert?

A: Some Alerts simply notify the student, while others automatically open a Case that prompts staff follow-up and intervention to reach a resolution