Creating a Prospective Student / Student Profile

Navigate allows users to create Prospective Student profiles. Prospective student profiles allow advising and faculty members to engage with prospective students and record their interactions through summary reports and staff-initiated appointment scheduling.

Overview

Prospective Students allows staff to engage with prospective students and record their interactions. This new functionality has three components:

1. Create: Navigate creates prospective student record by applying a classification of "prospective" during student creation.
2. Match: Navigate runs a matching algorithm nightly. This identifies "prospective students" whose records appear similar to "matriculated students". Students are matched, AT A MINIMUM, with First name, last name, and date of birth. Zip Code can also be used to match students.
3. Merge: Staff users with correct permissions merge prospective student records and associated data into matriculated student records. Data like summary reports and appointments will be consolidated into a single student profile view.

Creating a Prospective Student / Student

Staff who have the Create a Student permission will be able to quickly add a prospective student record from a Quick Link on Staff Home. Users will click Create a New Student and complete the form that will auto-generate. (next page)
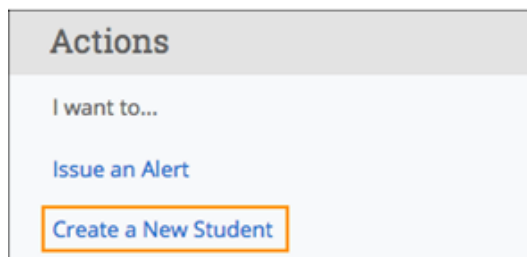
Staff users will enter the student's first name, last name, email, date of birth, zip code and select the student's classification as Prospective. If a prospective student also has an enrolled student profile or an already created prospective student profile, all users will see the below yellow bar.

NOTE: If the student has a student ID, enter the student's ID and set the student's classification as Freshman or the most appropriate Classification

⚠ One appears to have had a profile created for them as a prospective student 7 days ago (on 12/28/2018). Would you like to view details and merge?   **View options**

CREATE A NEW STUDENT

First Name *	
Last Name *	
Student ID	
Email *	
Classification	Prospective
Address 1	
Address 2	
City	
State	Select a State
Zip *	
Home Phone	
Cell Phone	
Date of Birth *	

Cancel   **Create Student**

This form can also be accessed from the Appointment Center view when creating an appointment. The user creating the appointment will need to have the appropriate permissions to create the prospective student.

CREATE AN APPOINTMENT

Service	Please select a service ▼ Show All Services for this location
Organizer	
Student	Enter Student Name 🔍 Create a Student
When	[ ] 2:45pm 30 min ▼
Comments	Enter comments
Options	☐ Student has checked in for appointment
	☐ Send E-mail Reminder to the organizer attendee
	☑ Send E-mail Reminder to non organizer attendees
	☑ Send Text Reminder to non organizer attendees

Cancel   **Create Appointment**