

Adding a To-Do



To-Dos are created by staff members in order to prompt a future action regarding a particular student. They can be useful to track next steps for the staff member, to follow up on pertinent information shared during an appointment, or to reconnect with a student at a more appropriate time.

Who can write a To-Do?

Anyone with the role of Administrator or Advisor can write a To-Do.

Who can read/see a To-Do?

Only you can see the To-Dos that you have created. Other staff cannot see To-Do's you've created. Students can see To-Do's that you've made visible to them when you created the To-Do.

If the To-Do writer checks the box next to "Make this visible to the student", the student will be able to read/see the To-Do in the Navigate app/portal.

Step-by-step instructions

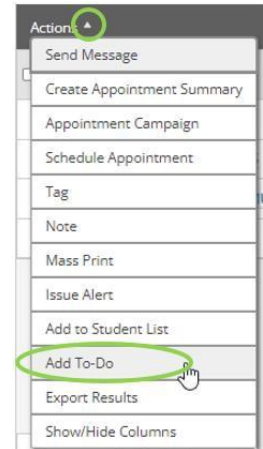
1. Search for the student by typing their name, RUID, or 6-digit ID in the search box in the top middle of the screen

The screenshot shows the top navigation bar of the Rutgers University Newark Navigate portal. The header is red with the text "RUTGERS UNIVERSITY - NEWARK". Below the header, there is a navigation bar with the "NAVIGATE" logo, a notification bell with "180", and a "Quick Search" box with a green arrow pointing to it. The main content area shows "Staff Home" with a dropdown arrow, and tabs for "Students", "Appointments", "My Availability", "Appointment Queues", and "Appointment Requests". Below the tabs, it says "My Assigned Students for 2021 Fall" with a dropdown arrow. A table header is visible with columns: "ALL", "STUDENT NAME", "ID", "STUDENT LIST", "CUMULATIVE GPA", and "PREDICTED SUPPORT LEVEL".

2. On the right side of the student's page, select **"Add a To-Do to this Student"**

The screenshot shows a "Current Alerts" dropdown menu with a yellow circle containing the number "0". The menu items are: "I want to...", "Message Student", "Add a Note on this Student", "Add a To-Do to this Student" (highlighted with a green arrow), "Report on Appointment", "Create Request for Appointment", "Schedule an Appointment", "Add to Student List", and "Issue an Alert".

Another option is to use the **Add To-Do** function in the **Actions** menu from your Assigned Students table, an Advanced Search, a Saved Search, or a Student List.



3. Enter the Title of your To-Do. This text is what you (& the student) will see as the To-Do. In the Description field you have the option to add a detailed description with links, text, and other information. You cannot attach files to a To-Do.
4. You have the option to make the To-Do visible to the student.
 - Checking **Make this visible to the student** makes the To-Do visible and available to the student in the Navigate app/portal.
 - Checking **Email the student about this to-do** sends an email reminder to the student about the to-do. The student will receive an email with a link to log into the Navigate app/portal where they can then see the To-Do.
5. Select a Due Date. This will be visible to both the staff member and the student (if you've made the To-Do visible to them).

Add A To-Do To TEST A TEST A

* Title
Start with an action verb and use sentence case.

Description
Add text, links, phone numbers, etc.

B *I* | Paragraph |

Make this visible to the student
 Email the student about this to-do

Due Date
Wednesday, April 6th 2022 ▾

Save To-Do Cancel

7. Click **Save To-Do**

How do you view your To-Dos?

Staff can view their own To-Dos about a specific student via the History tab on the student's profile. Staff can view all of their To-Dos about any student by opening their To-Dos page

You can also see a portion of your To-Dos on the right side of your Staff Home page. Clicking **View More** at the bottom will take you to your My To-Dos page to view your full list of To-Dos.



The default view is to only show the To-Dos that have not reached their Due Date. You can uncheck the *Hide Completed* checkbox to show all To-Dos.

Your To-Dos For Test A Test A

Actions ▾						
<input type="checkbox"/>	TO-DO	VIEWABLE TO STUDENT	DUE DATE	COMPLETED	COMPLETED BY	ACTIONS
<input type="checkbox"/>	Ask about summer internship	No	09/23/2022			Edit

How do you edit your To-Dos?

Staff can use the edit link next to each To-Do to modify the title, description, &/or due date of the To-Do.

Frequently Asked Questions

I took action on a To-Do that I set for myself. How can I remove the To-Do from my list?

You can remove the To-Do by clearing the selected To-Do using the **Actions** menu.

Can the student see the To-Dos that I've added to their profile?

If you've made it visible to them when creating the To-Do, they can see it in the Navigate app/portal.

Can other users view the To-Dos that I have added to the student's profile?

No. Other users can only see the To-Dos that they have added to that student's profile.