



UTC Staff Roles Overview

Staff users **MUST** complete FERPA verification prior to being assigned one of the following roles.

Users may be assigned more than one role based on need and/or position.

| Role Title | Permissions | Designed For... |
|----------------|--|--|
| Advisor | <ul style="list-style-type: none"> • View All Notes on Students • Allow User to Email Students • View Assignments on the Courses Tab • Allow User to Text Students • Search for All Students • Mass Add Student Tags to Students • View Absence • Record Attendance for All Classes • View Help Center & Support Resources • View the Search Page and Search for Students • Quick Search (User Can Search on All Users via Quick Search) • View the Primary Student ID on the Overview • View Other Users Conversations (Emails, Texts, Phone Calls) • View the Appointment Queue Tab on the Home Page • Print Student Calendars • View and Search Using the Advanced Search Filters • General Appointment Create • View Only Assigned Students' Profiles • Allow User to Email Staff Users • Allow User to Edit, Update and Close Cases • View and Search on GPA-related Information in the Advanced Search • View Analytics • Delete Check-Ins from Students via the Check-Ins Report • Create Student Lists • Add & Remove Student Tags That Currently Exist on Students • Allow User to Sync Calendar with Exchange • Allow User to View Exchange Calendar Sync Options • View Only Profiles of Students Enrolled in Their Class | Professional and faculty advisors, or other users with a need to regularly access student profiles in Navigate. Users with this role permission can complete most conventional Navigate tasks such as setting up appointment availability, using advanced search functions, entering appointment summaries, starting the kiosk, messaging students, and viewing full student profiles. |

- View Student Categories on the Overview
- View the Custom Links Sidebar on the Student Profile
- Add Attachments to Notes
- View the 30-second Overview on the Overview Tab
- View Student Profiles
- View the Overview Tab on the Student Profile
- View Success Progress Tab on the Student Profile
- View Courses Tab on the Student Profile
- View the Path Tab on the Student Profile
- View the Major Explorer Tab on the Student Profile
- View the Calendar Tab on the Student Profile
- View the Study Hall Tab on the Student Profile
- View the Appointments Tab on the Student Profile
- View the Conversations Tab on the Student Profile
- View the History Tab on the Student Profile
- View Cases on the History Tab
- View Reports / Notes Tab on the Student Profile
- View Cases on the Reports/Notes Tab
- View Population Health Analytics Dashboard
- Allow Drill Down
- View Non-Student Profiles
- View Student Profiles for All Students
- View Student's Campaign Involvement
- View Alert on the Student Profile
- View Intervention Effectiveness Dashboard
- Edit Notes Created by Self
- Delete Notes Created by Self
- Start the Kiosk
- Start the Appointment Center
- View Predicted Support Level on the Student Profile
- View Success Team
- View Alert Report
- View Appointments Report
- View Appointment Summaries Report
- View Cases Report
- View Check-ins Report
- View Enrollments Report
- View Notes Report
- View Progress Reports Report
- View Student Info Report
- View Appointment Campaigns Report
- Create General Appointments for Self
- Create General Appointments for Others
- Edit General Appointments for Self
- Edit General Appointments for Others

| | | |
|---------------------------------|---|---|
| | <ul style="list-style-type: none"> • View GPA in Search Results • Allow user to filter by Success Markers • Allow user to view/filter by Support Level • View Alert • Allow Staff to Create and Update To-Dos for Students • Allow users to view Categories that are not assigned to a particular Care Unit • Create, Edit, Delete Their Own Messaging Campaigns | |
| Front Desk Administrator | <ul style="list-style-type: none"> • View Progress Reports on Students • Create Notes on Students • View All Notes on Students • Allow User to Email Students • Allow User to Text Students • Search for All Students • Search for Users across All User Types • Mass Add Student Tags to Students • View Help Center & Support Resources • View the Search Page and Search for Students • Quick Search (User Can Search on All Users via Quick Search) • View the Primary Student ID on the Overview • View the Appointment Queue Tab on the Home Page • View and Search Using the Advanced Search Filters • General Appointment Create • View Analytics • Appointment Dashboards • Delete Check-Ins from Students via the Check-Ins Report • Create Student Lists • Add & Remove Student Tags That Currently Exist on Students • Allow User to Sync Calendar with Exchange • Allow User to View Exchange Calendar Sync Options • View Only Profiles of Students Enrolled in Their Class • View the Custom Links Sidebar on the Student Profile • Add Attachments to Notes • View the 30-second Overview on the Overview Tab • View Student Profiles • View the Overview Tab on the Student Profile • View Success Progress Tab on the Student Profile • View Courses Tab on the Student Profile | <p>Users that are responsible for the incoming/outgoing of general information within a campus location. Users are often the first point of contact for students within a department. Most important functions may be starting the kiosk, appointment center, and messaging students.</p> |

| | | |
|----------------------------------|---|------------------------------------|
| | <ul style="list-style-type: none"> • View the Path Tab on the Student Profile • View the Major Explorer Tab on the Student Profile • View the Calendar Tab on the Student Profile • View the Study Hall Tab on the Student Profile • View the Appointments Tab on the Student Profile • View the Conversations Tab on the Student Profile • View the History Tab on the Student Profile • View Cases on the History Tab • View Reports / Notes Tab on the Student Profile • View Cases on the Reports/Notes Tab • View Population Health Analytics Dashboard • View Non-Student Profiles • View Student Profiles for All Students • View Student's Campaign Involvement • View Alert on the Student Profile • View Intervention Effectiveness Dashboard • Edit Notes Created by Self • Delete Notes Created by Self • Start the Kiosk • Start the Appointment Center • View Appointments Report • View Appointment Requests Report • View Appointment Summaries Report • View Attendances Report • View Availabilities Report • View Check-ins Report • Create General Appointments for Self • Create General Appointments for Others • Edit General Appointments for Self • Edit General Appointments for Others • Manage Target Hours for Others • Chat With EAB Support • View GPA in Search Results • Allow user to filter by Success Markers • Allow user to view/filter by Support Level • View Alert | |
| College or Program Leader | <ul style="list-style-type: none"> • Create Progress Report Campaigns • View Progress Reports on Students • Create Notes on Students • View All Notes on Students • Allow User to Email Students • View Assignments on the Courses Tab • Allow User to Text Students • Search for All Students • Delete Student Tags • Mass Add Student Tags to Students | Leadership of Academic Departments |

- View Absence
- Mass Edit Student Information
- View Help Center & Support Resources
- View Other Users Conversations (Emails, Texts, Phone Calls)
- View Enrollment Census Campaigns
- View Enrollment Census Reports
- View and Search Using the Advanced Search Filters
- View Only Assigned Students' Profiles
- Edit Progress Reports Created by Self
- Delete Progress Reports Created by Self
- View and Search on GPA-related Information in the Advanced Search
- View Analytics
- Appointment Dashboards
- Student Dashboards
- View and Search on Race or Ethnicity Filters in the Advanced Search
- Create Student Lists
- Add & Remove Student Tags That Currently Exist on Students
- View Only Profiles of Students Enrolled in Their Class
- View the Custom Links Sidebar on the Student Profile
- View Student Profiles
- View Success Progress Tab on the Student Profile
- View Courses Tab on the Student Profile
- View the Path Tab on the Student Profile
- View the Major Explorer Tab on the Student Profile
- View the Calendar Tab on the Student Profile
- View the Study Hall Tab on the Student Profile
- View the Appointments Tab on the Student Profile
- View the Conversations Tab on the Student Profile
- View the History Tab on the Student Profile
- View Cases on the History Tab
- View Reports / Notes Tab on the Student Profile
- View Cases on the Reports/Notes Tab
- View Population Health Analytics Dashboard
- Allow Drill Down
- View Non-Student Profiles
- View Student Profiles for All Students
- View Alert on the Student Profile
- View Intervention Effectiveness Dashboard
- View Appointments Report
- View Appointment Summaries Report

| | | |
|-------------------------------|--|--|
| | <ul style="list-style-type: none"> • View Attendances Report • View Cases Report • View Check-ins Report • View Enrollments Report • View Notes Report • View Appointment Campaigns Report • View Historical Course Analytics Dashboard • View Historical Population Analytics Dashboard • View GPA in Search Results • Allow user to filter by Success Markers • Allow user to view/filter by Support Level • View Alert • Allow users to view Categories that are not assigned to a particular Care Unit | |
| Location Administrator | <ul style="list-style-type: none"> • Create Notes on Students • View All Notes on Students • Allow User to Email Students • View Assignments on the Courses Tab • Allow User to Text Students • Record Attendance for Classes User is Instructing • Search for All Students • Search for Users across All User Types • Create Student Tags • Delete Student Tags • Mass Add Student Tags to Students • View Absence • Manage Location Configurations • View Help Center & Support Resources • View the Search Page and Search for Students • Quick Search (User Can Search on All Users via Quick Search) • View the Primary Student ID on the Overview • Manage School Important Information • Manage Student Tags • View Other Users Conversations (Emails, Texts, Phone Calls) • View the Appointment Queue Tab on the Home Page • Print Student Calendars • View and Search Using the Advanced Search Filters • General Appointment Create • View Only Assigned Students' Profiles • View and Search on GPA-related Information in the Advanced Search • View Analytics • Appointment Dashboards | <p>Users who are in leadership roles within a non-academic department.</p> |

- Student Dashboards
- Delete Check-Ins from Students via the Check-Ins Report
- Create Student Lists
- Add & Remove Student Tags That Currently Exist on Students
- Allow User to Sync Calendar with Exchange
- Allow User to View Exchange Calendar Sync Options
- View Only Profiles of Students Enrolled in Their Class
- View Student Categories on the Overview
- View the Custom Links Sidebar on the Student Profile
- Add Attachments to Notes
- View the 30-second Overview on the Overview Tab
- View Student Profiles
- View the Overview Tab on the Student Profile
- View Success Progress Tab on the Student Profile
- View Courses Tab on the Student Profile
- View the Path Tab on the Student Profile
- View the Major Explorer Tab on the Student Profile
- View the Calendar Tab on the Student Profile
- View the Study Hall Tab on the Student Profile
- View the Appointments Tab on the Student Profile
- View the Conversations Tab on the Student Profile
- View the History Tab on the Student Profile
- View Cases on the History Tab
- View Reports / Notes Tab on the Student Profile
- View Cases on the Reports/Notes Tab
- View Population Health Analytics Dashboard
- Allow Drill Down
- View Non-Student Profiles
- View Student Profiles for All Students
- View Alert on the Student Profile
- Edit Notes Created by Self
- Edit Notes Created by Other Users
- Delete Notes Created by Self
- Delete Notes Created by Other Users
- Start the Kiosk
- Start the Appointment Center
- View Predicted Support Level on the Student Profile
- View Alert Report
- View Appointments Report
- View Appointment Summaries Report
- View Attendances Report
- View Availabilities Report

| | | |
|------------------|--|--|
| | <ul style="list-style-type: none"> • View Check-ins Report • View Notes Report • View Progress Reports Report • View Assignments Report • View Student Info Report • Create General Appointments for Self • Create General Appointments for Others • Edit General Appointments for Self • Edit General Appointments for Others • Manage Target Hours for Others • Chat With EAB Support • View GPA in Search Results • Allow user to filter by Success Markers • Allow user to view/filter by Support Level • View Alert • Allow users to view Categories that are not assigned to a particular Care Unit | |
| Professor | <ul style="list-style-type: none"> • View Progress Reports on Students • View All Notes on Students • Allow User to Email Students • Create Student Assignments • View Assignments on the Courses Tab • Edit Student Assignments • Delete Student Assignments • Allow User to Text Students • Record Attendance for Classes User is Instructing • Mass Add Student Tags to Students • View Absence • View Help Center & Support Resources • View the Search Page and Search for Students • Quick Search (User Can Search on All Users via Quick Search) • View the Primary Student ID on the Overview • View Other Users Conversations (Emails, Texts, Phone Calls) • View and Search Using the Advanced Search Filters • View Only Assigned Students' Profiles • Allow User to Email Staff Users • Issue Alert for Any Student • Record Attendance for Days Class Is Not in Session • View and Search on GPA-related Information in the Advanced Search • Add & Remove Student Tags That Currently Exist on Students • Allow User to Sync Calendar with Exchange • Allow User to View Exchange Calendar Sync Options | Full-time and Part-time Faculty/Instructors. Additional permissions focused on classroom management. |

| | | |
|----------------------------------|--|--|
| | <ul style="list-style-type: none"> • View Only Profiles of Students Enrolled in Their Class • View the Custom Links Sidebar on the Student Profile • Add Attachments to Notes • View the 30-second Overview on the Overview Tab • View Student Profiles • View the Overview Tab on the Student Profile • View Success Progress Tab on the Student Profile • View Courses Tab on the Student Profile • View the Major Explorer Tab on the Student Profile • View the Calendar Tab on the Student Profile • View the Appointments Tab on the Student Profile • View the Conversations Tab on the Student Profile • View the History Tab on the Student Profile • View Student Profiles for All Students • View Student's Campaign Involvement • View Alert on the Student Profile • View Predicted Support Level on the Student Profile • View Alert Report • View Appointments Report • View Progress Reports Report • View Progress Report Campaigns Report • View Alert | |
| Application Administrator | <ul style="list-style-type: none"> • All permissions and edit capabilities | Designated EAB Application Administrators for UTC. Assists with granting permissions and managing the Navigate platform. |