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.

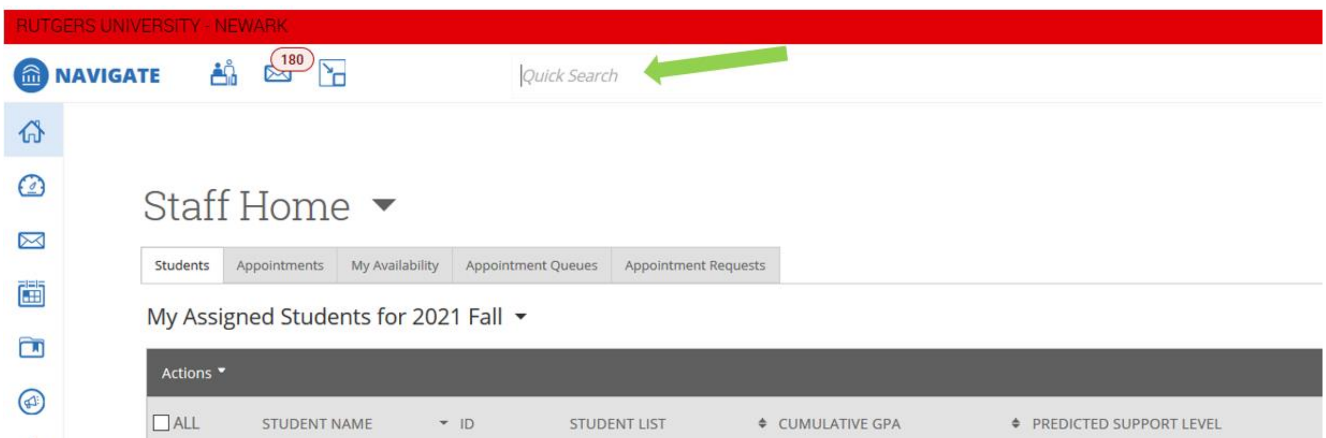
Who can read/see a To-Do?

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.

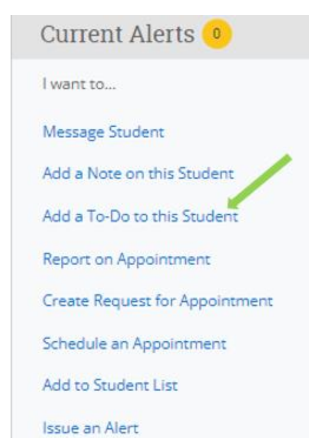
If the To-Do writer checks the box next to "Make this visible to the student", the student will be able to read/see the To-Do in the Navigate app/portal.

Step-by-step instructions

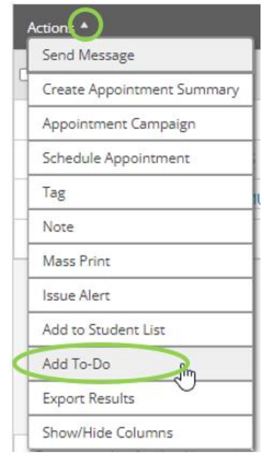
1. Search for the student by typing their name, RUID, or 6-digit ID in the search box in the top middle of the screen



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



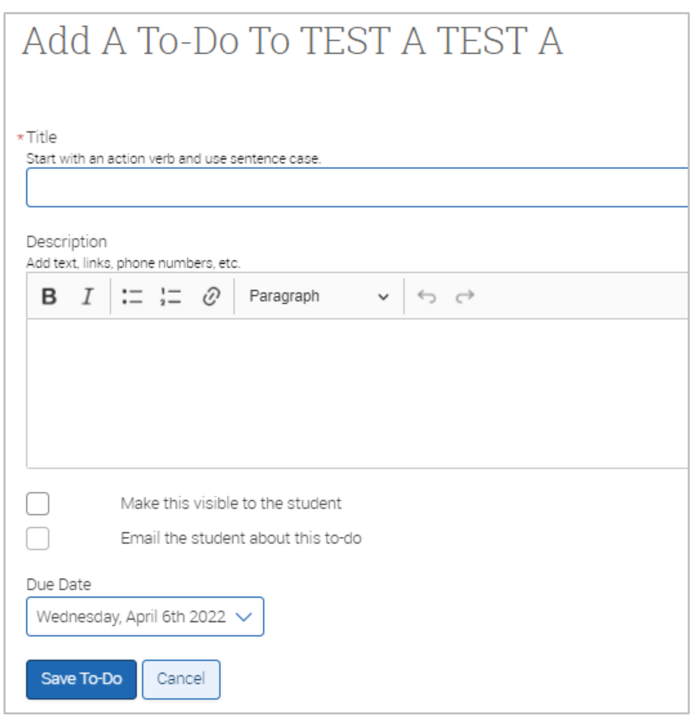
Another option is to use the **Add To-Do** function in the **Actions** menu from your Assigned Students table, an Advanced Search, a Saved Search, or a Student List.



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.

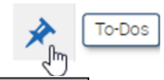
5. Select a Due Date. This will be visible to both the staff member and the student (if you've made the To-Do visible to them).



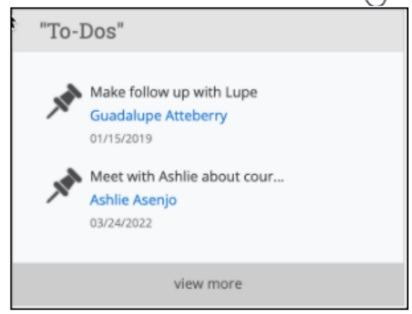
7. Click **Save To-Do**

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.

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.