EAB

Population Health Dashboard Feature Guide

Table of Contents

Introduction to Population Health Dashboard

The Population Health Dashboard (PHD) is EAB's latest tool to help you manage student success by identifying student populations in need of interventions and support and to track the progress of those populations.

Members can use PHD to find students in need of intervention and generate downloadable lists to be used in campaigns in Navigate.

This feature guide explains how PHD works, how to use the insights to find potential student populations of interest, and how to apply that student list to targeted interventions within the Navigate platform.

Overview Tab

PHD opens to the Overview tab.

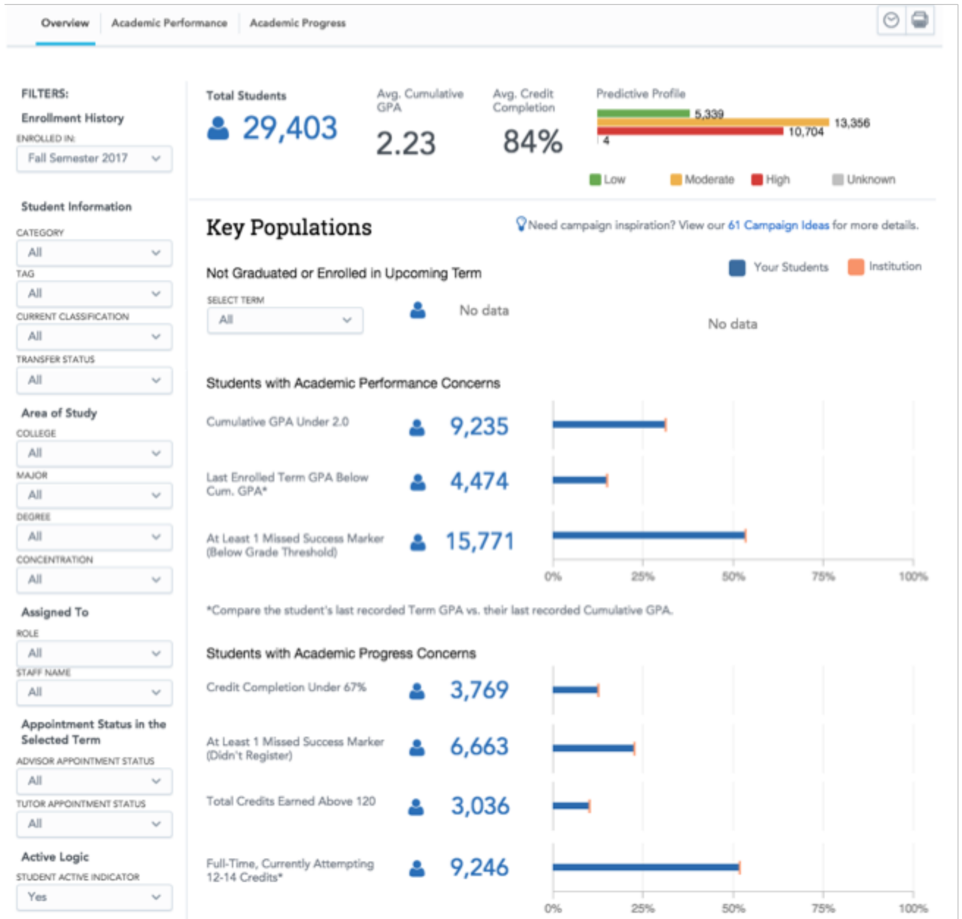


Figure 1. Population Health Dashboard Overview Page

This page displays key metrics to help your institution identify students potentially in need of additional support.

At the top of the dashboard is an overall "pulse check" of your student population. Users will see the total number of students, their average cumulative GPA, average credit completion, and their risk score breakdown, as shown in figure 2.

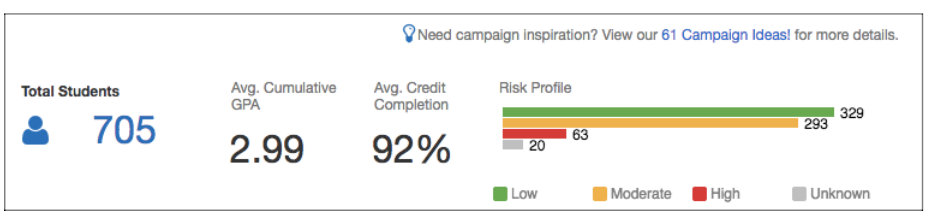


Figure 2. Overall "Pulse Check" of Student Population

There are three Key Populations on the dashboard: students who are Not Graduated or Enrolled in Upcoming Term, Students with Academic Performance Concerns, and Students with Academic Progress Concerns.

We display both the total number of students with this attribute, in addition to what percentage of your selected population that represents and how it compares to the institution average. The output to the right will display key metrics to help your institution identify students potentially in need of additional support or possibly nudging. These metrics will always reflect the current data on your student population, in either single data points or distributions, as you will see on the subsequent pages of these dashboards.

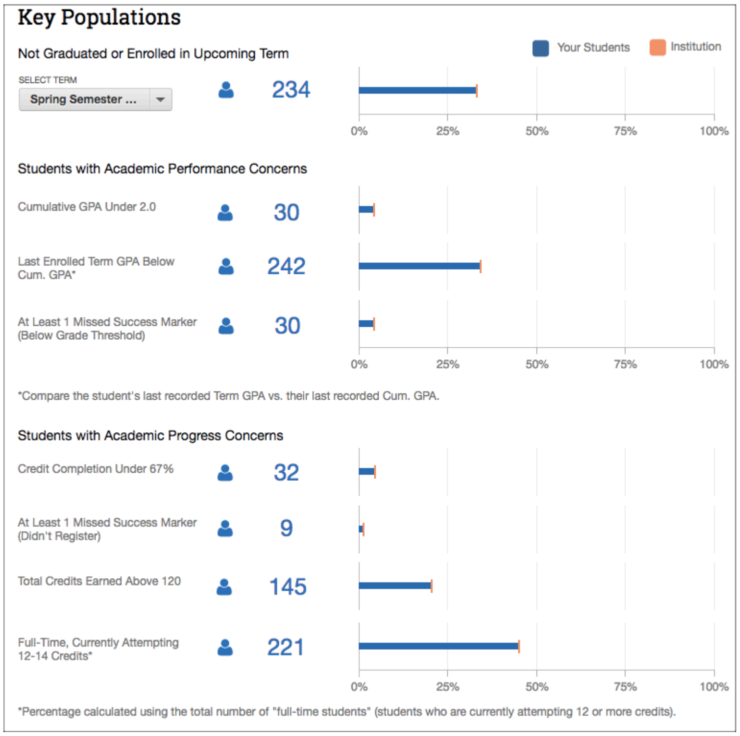


Figure 3. Key Populations on Overview Tab

To the left of the metrics is a filters section. Most of these filters correspond to a filter in the Advanced Search section of Navigate - Strategic Care. Table 1 describes the filters, how it is used, and if there is a corresponding filter in Advanced Search.

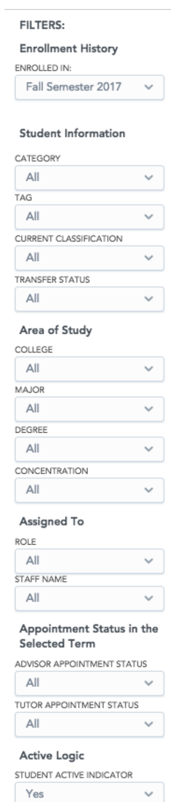


Figure 4. Population Health Dashboard Filters

Filter Name	Section	Description	Advanced Search Counterpart?
Enrolled In	Enrollment History	Returns students who have enrolled in the selected terms. This filter will select the current in-session term by default Note: Only one term may be selected at a time.	Enrollment History
Category	Student Information	Returns students who are currently associated in any selected category	Student Information > Category
Tag	Student Information	Returns students who are currently associated with any selected tag	Student Information > Tag
Current Classification	Student Information	Returns students who are CURRENTLY associated with the selected classifications	Term Data > Classification
Transfer Status	Student Information	Is the student a transfer student?	Student Information > Transfer Student
College	Area of Study	Select to filter to a particular college or division for the population	Area of Study > College
Major	Area of Study	Search for students by major for the current term	Area of Study > Major
Degree	Area of Study	Search for students by degree for the current term	Area of Study > Degree
Concentration	Area of Study	Search for students by concentration for the current term	Area of Study > Concentration
Role	Assigned To	Search for students assigned to an advisor or tutor	Assigned To
Staff Name	Assigned To	Search for students assigned to a specific staff member. The role will reflect current role status, not the status of a staff member in the enrolled term.	Assigned To
Advisor Appointment Status	Appt. Status in the Selected Term	Scheduled: Students who have an "Advising" appointment scheduled in the selected term (should not count if appointment was scheduled, but later canceled)	N/A

Filter Name	Section	Description	Advanced Search Counterpart?
		Completed: Students who have attended an "Advising" appointment. This includes Scheduled and Drop-In appointments. Not Yet Scheduled: Students who are not currently scheduled or have not attended an "Advising Appointment" in the selected term	
Tutor Appointment Status	Appt. Status in the Selected Term	Scheduled: Students who have a "Tutoring" appointment scheduled in the selected term (should not count if appointment was scheduled, but later cancelled) Completed: Students who have attended a "Tutoring" appointment (an appointment report was filed) Not Yet Scheduled: Students who are not currently scheduled or have not attended a "Tutoring" appointment.	N/A
Student Active Indicator	Active Logic	A student is considered active if they are flagged as active by your institution's active logic. Please contact your leadership team if you have questions about the logic governing your active indicator	N/A

Table 1. Filters in Population Health Dashboard

Once the student population is filtered to the desired target population, you can create and export lists for campaigns. See "Creating and Downloading Lists" for more information.

Academic Performance

The Academic Performance tab for PHD enables users to dive into metrics covered on the Overview tab in detail.

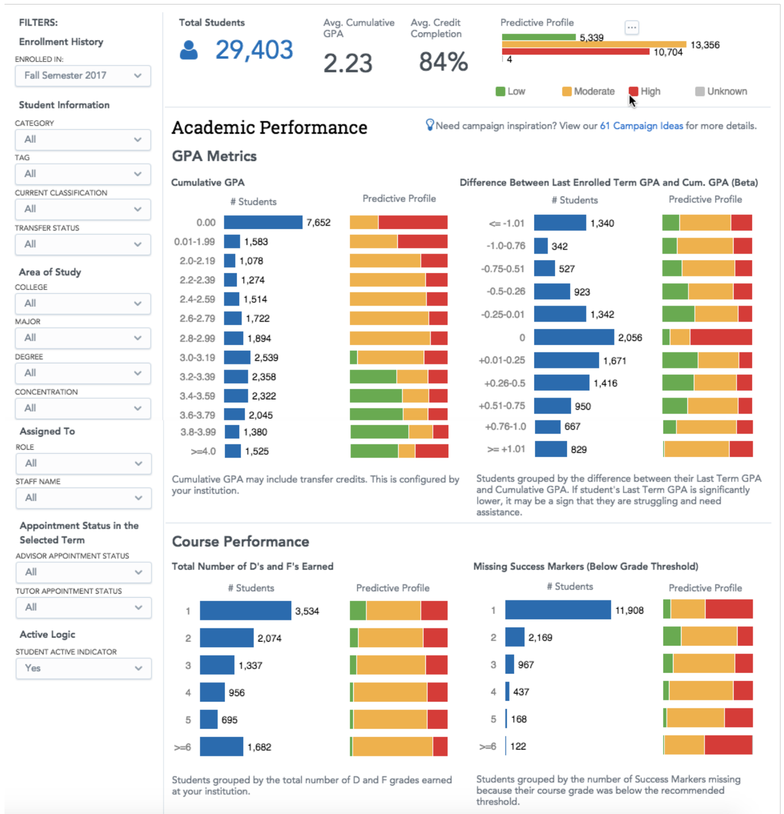


Figure 5. Academic Performance Tab

As mentioned above, Academic Performance drills into overview metrics. For example, instead of looking at students with GPAs under 2.0, users can look at all GPAs at the institution, bucketed into different bands. The Risk Profile is also shown for all metrics.

Metric Name	Description and Logic
Avg. Cum GPA	Average of the student population's Cum GPA
Avg. Credit Completion	Average of the student population's total earned institution credits divided by their total attempted institution credits
Cumulative GPA	Students bucketed by their current Cumulative GPA as defined by your institution's data GPA Buckets: < 2.0, increments of 0.2, > 4.0
Difference Between Last Enrolled Term and Cum GPA	Measures the difference in GPA between the student's last term GPA and their Cum GPA. Students grouped by the difference between their Last Term GPA and Cum GPA. If student's Last Term GPA is significantly lower, it may be a sign that they are struggling and need assistance. Buckets students by the amount their GPA was lower from the Cum GPA. Only shows students with a lower Term GPA. Buckets: increments of 0.25, >= 1.01

Metric Name	Description and Logic
Total Number of Ds and Fs Earned	Students grouped by the total number of D and F grades earned at your institution.
Missing Success Markers (Below Grade Threshold)	Total number of students who are missing at least 1 success marker because their grade was below the recommended threshold

Table 2. Metrics on the Academic Performance tab

Likewise, users can also look at the amount the last term's GPA varies from cumulative GPA at a granular level, the number of D's and F's earned over the academic career, or the number of missing Success Markers.

Also, like the Overview tab, users can use the filters on the left-hand side of the page to narrow the student population down to the preferred set of students. Users can also click on blue bars or #Students to bring up a list of students to download or export for campaigns.

Academic Progress

The Academic Progress tab of the PHD dashboard drills into and adds to metrics shown on the Overview tab that highlight potential issues related to academic progress for students.

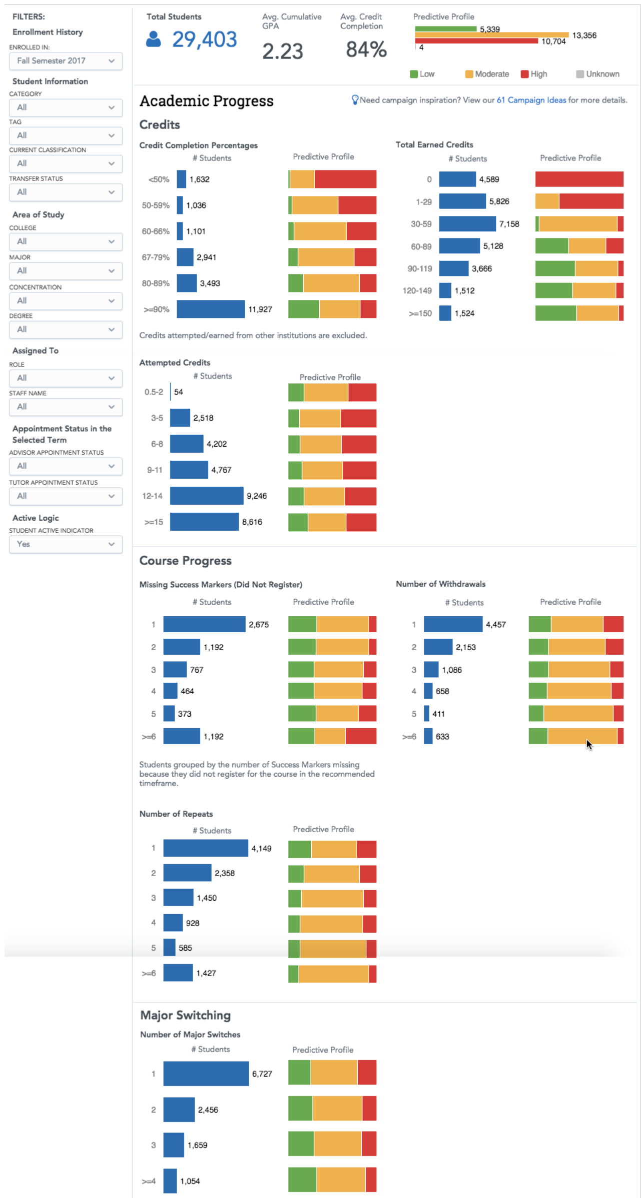


Figure 6. Academic Progress tab

Academic Progress drills into overview metrics and adds new ones so users can understand their student population's academic progress in depth. For example, instead of looking at students' average credit completion, users can look at credit completion and total number of credits taken across the institution, bucketed into different bands. The Risk Profile is also shown for all metrics.

Metric Name	Description and Logic
Avg. Cum GPA	Average of the student population's Cum GPA. This metric excludes students with 0.0 GPAs.
Avg. Credit	Average of the student population's total earned

Metric Name	Description and Logic
Completion	institution credits divided by their total attempted institution credits
Credit Completion Percentage	Students bucketed by their current credit completion %. Credit completion % = Institution Credits Earned / Institution Credits Attempted.
Total Earned Credits	Students bucketed by the total # of credits earned by student. Buckets: 30 credit increments, up to > 150
Attempted Credits	Students bucketed by the credits they are attempting in the current term. Buckets: < 3, 3-5, 6-8, 9-11, 12-14, >= 15
Missing Success Markers (Didn't Register)	Total number of students who are missing at least 1 success marker because they did not register
Number of Withdrawals	Students bucketed by the total number of withdrawn courses over the lifetime of the student
Number of Repeats	Students bucketed by the total number of repeated courses over the lifetime of the student
Number of Major Switches	Students bucketed by the number of times a student has switched majors at this institution.

Table 3. Metrics on the Academic Progress tab

Like on the other tabs, users can click on blue bars or #Students to bring up a list of students to download or export for campaigns.

You can also use the filters on the left hand side to narrow the student population to a preferred list, as on the other tabs.

Generating and Downloading Lists of Students

Now that you understand the features and metrics in Population Health Dashboard, it's time to learn how to create and download a list of students for use in a campaign in Navigate.

Step One: Use Filters to Create a List of Students

The first step is to narrow the student population so that you are creating a campaign with the right students. To do that, you will need to use the filters. Please note that by default, the filters select all of the available options to get the widest possible group of students, except for Term.

The Term filter can only select one term at a time; you cannot select multiple terms on the filter. By default, the term filter selects the currently active term.

So to begin, choose your criteria from the filters. You can choose to look only at freshmen, all students enrolled in the current term, students assigned to you, or other choices.

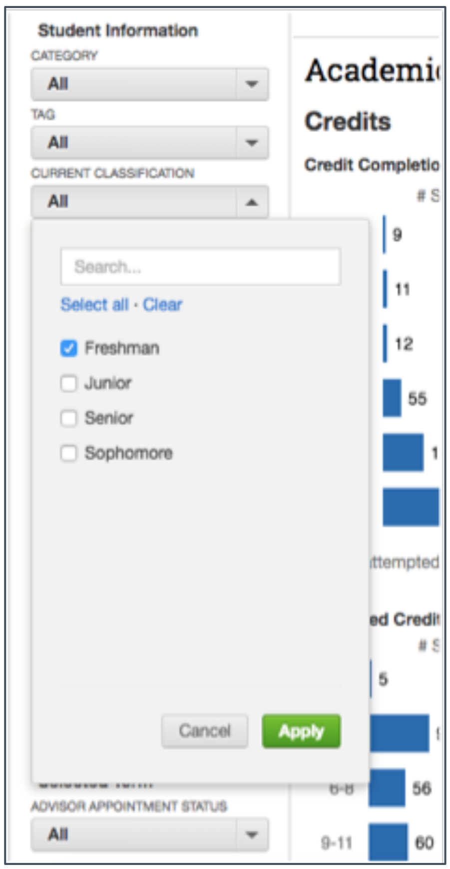


Figure 7. Filtering Student Population

Step Two: Choose Metric for the List

Once you have narrowed your population appropriately, you will need to decide which metric to create your list from. This could be "total students" or it could use one of the metrics from PHD. For example, if you have filtered only to look at freshman, you can then choose to look at freshman credit loads by going to the Academic Progress tab and looking at the breakdown of that population, as shown in figure 8.

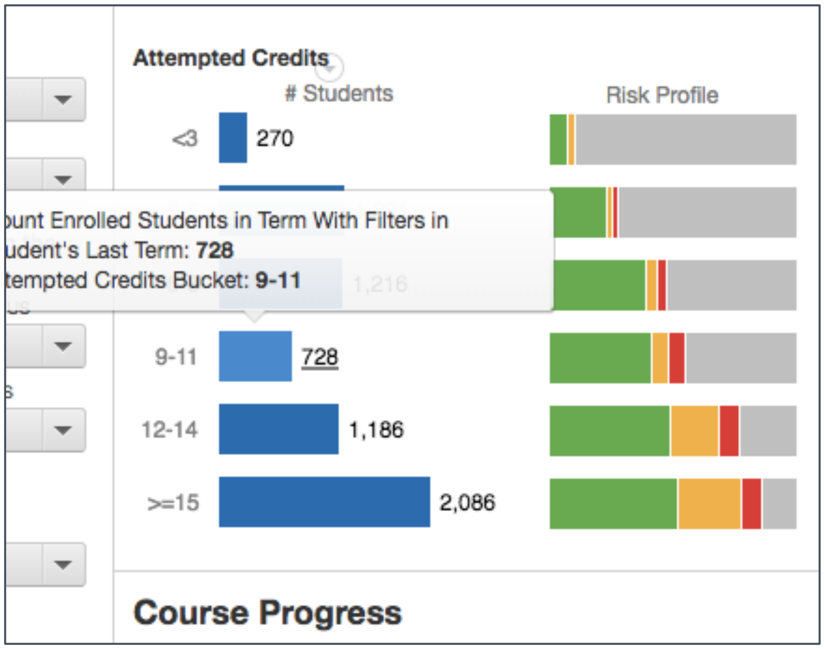
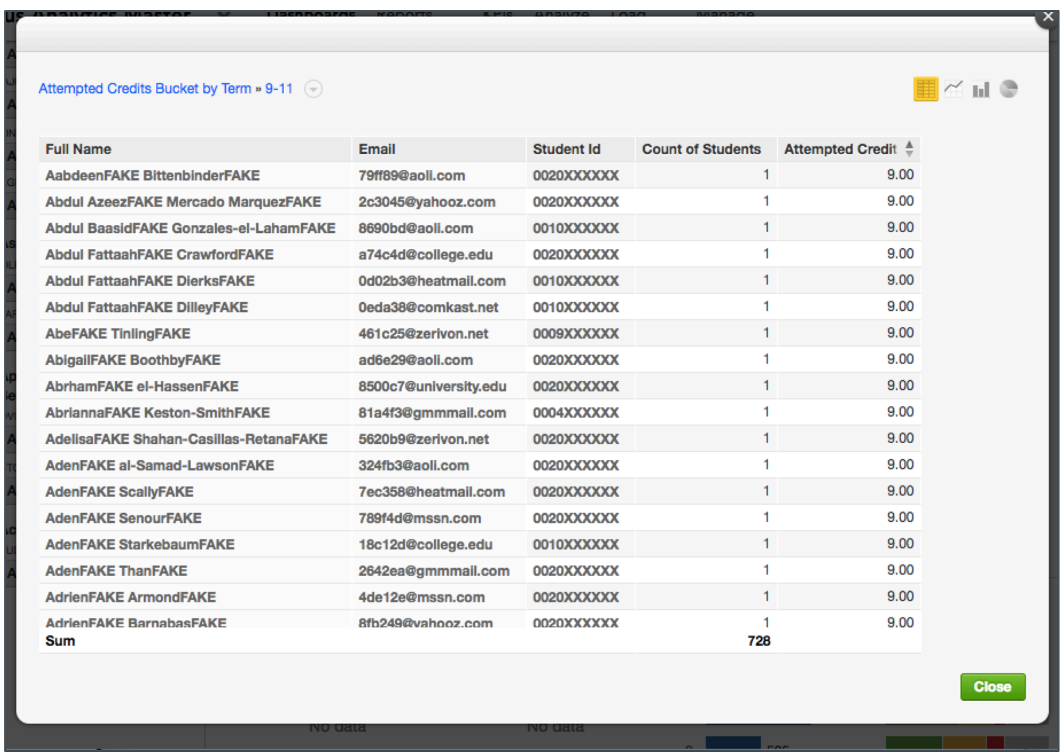


Figure 8. Freshman Credit Load

Step Three: Open the List of Students

Now that you have decided you want to create a campaign for freshmen are currently attempting 9-11 credits, you need to open and download student lists. You do that by clicking on the blue bar next to the first credit total bucket. A window will appear with a list of students who match the criteria.



Attempted Credits Bucket by Term » 9-11

Full Name	Email	Student Id	Count of Students	Attempted Credit
AabdeenFAKE BittenbinderFAKE	79ff89@aoli.com	0020XXXXXX	1	9.00
Abdul AzeezFAKE Mercado MarquezFAKE	2c3045@yahooz.com	0020XXXXXX	1	9.00
Abdul BaasidFAKE Gonzales-el-LahamFAKE	8690bd@aoli.com	0010XXXXXX	1	9.00
Abdul FattaahFAKE CrawfordFAKE	a74c4d@college.edu	0020XXXXXX	1	9.00
Abdul FattaahFAKE DierksFAKE	0d02b3@heatmail.com	0010XXXXXX	1	9.00
Abdul FattaahFAKE DilleyFAKE	0eda38@comkast.net	0010XXXXXX	1	9.00
AbeFAKE TinlingFAKE	461c25@zerivon.net	0009XXXXXX	1	9.00
AbigailFAKE BoothbyFAKE	ad6e29@aoli.com	0020XXXXXX	1	9.00
AbrhamFAKE el-HassenFAKE	8500c7@university.edu	0020XXXXXX	1	9.00
AbriannaFAKE Keston-SmithFAKE	81a4f3@gmmmail.com	0004XXXXXX	1	9.00
AdelisaFAKE Shahan-Casillas-RetanaFAKE	5620b9@zerivon.net	0020XXXXXX	1	9.00
AdenFAKE al-Samad-LawsonFAKE	324fb3@aoli.com	0020XXXXXX	1	9.00
AdenFAKE ScallyFAKE	7ec358@heatmail.com	0020XXXXXX	1	9.00
AdenFAKE SenourFAKE	789f4d@mssn.com	0020XXXXXX	1	9.00
AdenFAKE StarkebaumFAKE	18c12d@college.edu	0010XXXXXX	1	9.00
AdenFAKE ThanFAKE	2642ea@gmmmail.com	0020XXXXXX	1	9.00
AdrienFAKE ArmondFAKE	4de12e@mssn.com	0020XXXXXX	1	9.00
AdrienFAKE BarnabasFAKE	8fb249@yahooz.com	0020XXXXXX	1	9.00
Sum			728	

Close

Figure 9. List of Students from Chosen Metric

Step Four: Download the List

Now that you have a more targeted list of students, you can download the list as a CSV file for use in a campaign. To do that, click on the arrow next to the report name.

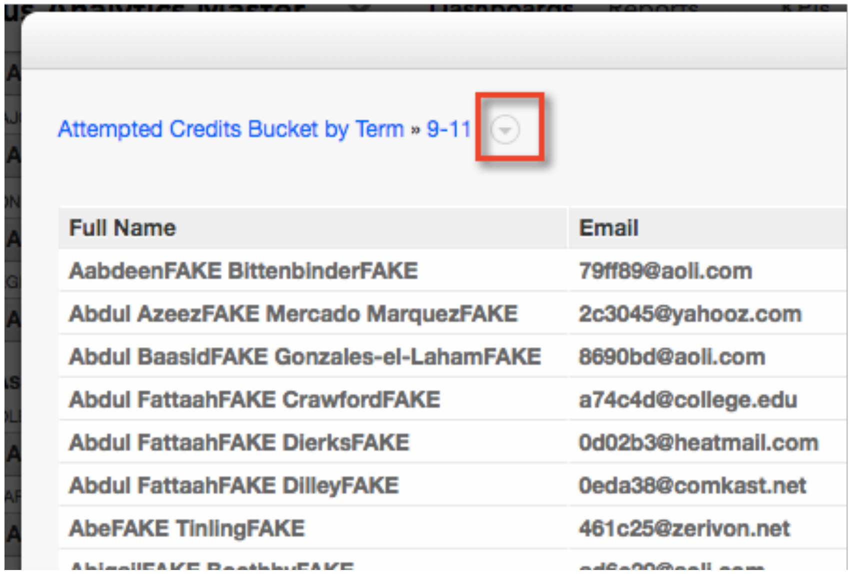


Figure 10. Opening a Student Report Menu

Click "Download As" on this menu to see the file formats you can use. Download as a CSV file, because that is the format used when uploading Watch Lists in the platform.

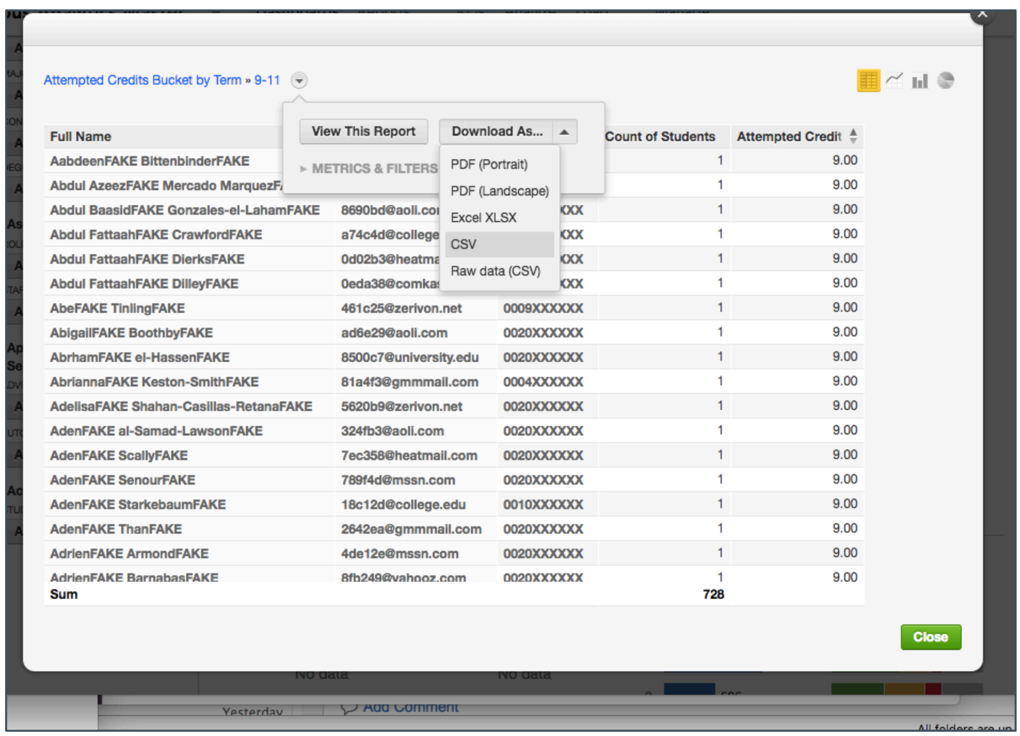
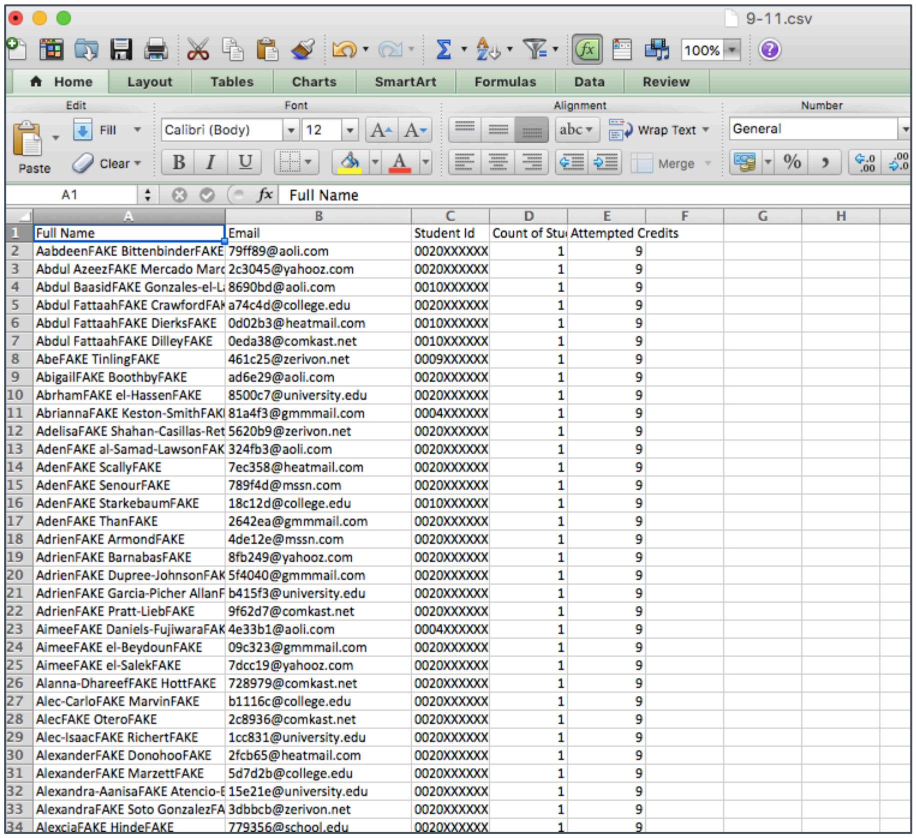


Figure 11. Download As Menu with Options

The file will export and show wherever downloaded files are stored on your desktop.

Finally, this is what the file looks like after download. It should have the relevant student information for you to use later.



	A	B	C	D	E
1	Full Name	Email	Student Id	Count of Stu	Attempted Credits
2	AabdeenFAKE BittenbinderFAKE	79ff89@aoli.com	0020XXXXXX	1	9
3	Abdul AzeezFAKE Mercado Marc	2c3045@yahooz.com	0020XXXXXX	1	9
4	Abdul BaasidFAKE Gonzales-el-L	8690bd@aoli.com	0010XXXXXX	1	9
5	Abdul FattaahFAKE CrawfordFAK	a74c4d@college.edu	0020XXXXXX	1	9
6	Abdul FattaahFAKE DierksFAKE	0d02b3@heatmail.com	0010XXXXXX	1	9
7	Abdul FattaahFAKE DilleyFAKE	0eda38@comkast.net	0010XXXXXX	1	9
8	AbeFAKE TinlingFAKE	461c25@zerivon.net	0009XXXXXX	1	9
9	AbigailFAKE BoothbyFAKE	ad6e29@aoli.com	0020XXXXXX	1	9
10	AbrhamFAKE el-HassenFAKE	8500c7@university.edu	0020XXXXXX	1	9
11	AbriannaFAKE Keston-SmithFAKI	81a4f3@gmmmail.com	0004XXXXXX	1	9
12	AdelisaFAKE Shahan-Casillas-Ret	5620b9@zerivon.net	0020XXXXXX	1	9
13	AdenFAKE al-Samad-LawsonFAK	324fb3@aoli.com	0020XXXXXX	1	9
14	AdenFAKE ScallyFAKE	7ec358@heatmail.com	0020XXXXXX	1	9
15	AdenFAKE SenourFAKE	789f4d@mssn.com	0020XXXXXX	1	9
16	AdenFAKE StarkebaumFAKE	18c12d@college.edu	0010XXXXXX	1	9
17	AdenFAKE ThanFAKE	2642ea@gmmmail.com	0020XXXXXX	1	9
18	AdrienFAKE ArmondFAKE	4de12e@mssn.com	0020XXXXXX	1	9
19	AdrienFAKE BarnabasFAKE	8fb249@yahooz.com	0020XXXXXX	1	9
20	AdrienFAKE Dupree-JohnsonFAK	5f4040@gmmmail.com	0020XXXXXX	1	9
21	AdrienFAKE Garcia-Picher AllanF	b415f3@university.edu	0020XXXXXX	1	9
22	AdrienFAKE Pratt-LiebFAKE	9f62d7@comkast.net	0020XXXXXX	1	9
23	AimeeFAKE Daniels-FujiwaraFAK	4e33b1@aoli.com	0004XXXXXX	1	9
24	AimeeFAKE el-BeydounFAKE	09c323@gmmmail.com	0020XXXXXX	1	9
25	AimeeFAKE el-SalekFAKE	7dcc19@yahooz.com	0020XXXXXX	1	9
26	Alanna-DhareefFAKE HottFAKE	728979@comkast.net	0020XXXXXX	1	9
27	Alec-CarloFAKE MarvinFAKE	b1116c@college.edu	0020XXXXXX	1	9
28	AlecFAKE OteroFAKE	2c8936@comkast.net	0020XXXXXX	1	9
29	Alec-IsaacFAKE RichertFAKE	1cc831@university.edu	0020XXXXXX	1	9
30	AlexanderFAKE DonohooFAKE	2fcb65@heatmail.com	0020XXXXXX	1	9
31	AlexanderFAKE MarzettFAKE	5d7d2b@college.edu	0020XXXXXX	1	9
32	Alexandra-AanisaFAKE Atencio-E	15e21e@university.edu	0020XXXXXX	1	9
33	AlexandraFAKE Soto GonzalezFA	3dbbcb@zerivon.net	0020XXXXXX	1	9
34	AlexciaFAKE HindeFAKE	779356@school.edu	0020XXXXXX	1	9

Figure 12. CSV File with Student Information

These steps can be repeated for each bucket of students for your chosen filters and metric.

Uploading Student Lists into Navigate

Once you have a list of students who may potentially need intervention, you can upload that list into the Navigate platform and use it with the Campaigns feature.

Step One: Upload CSV to Watch List

Open the Navigate – Strategic Care platform and navigate to the Lists and Search page. In the **Actions** menu of Watch Lists, select **Upload Watch List**.

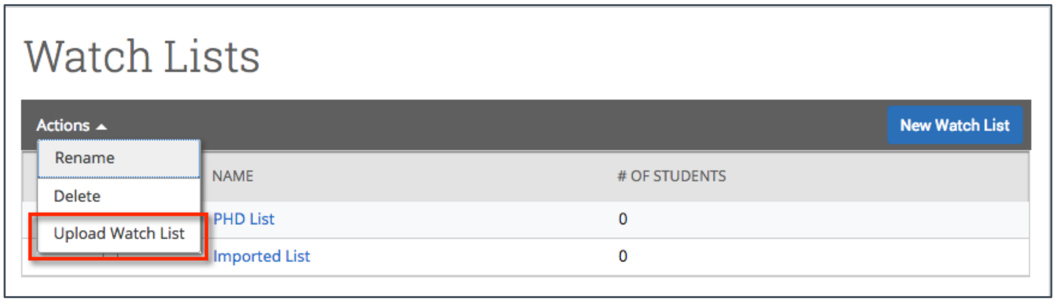


Figure 13. Upload Watch List in Actions Menu

Next, create a new Watch List or add the students in your list to an existing Watch List. Select the file and upload it. Choose the column that represents Student ID and then finish the import.

Step Two: Create Appointment Campaign from List

Either go directly to the Watch List or open the Watch List at any point while in Navigate. From the Actions menu, select **Appointment Campaign.**

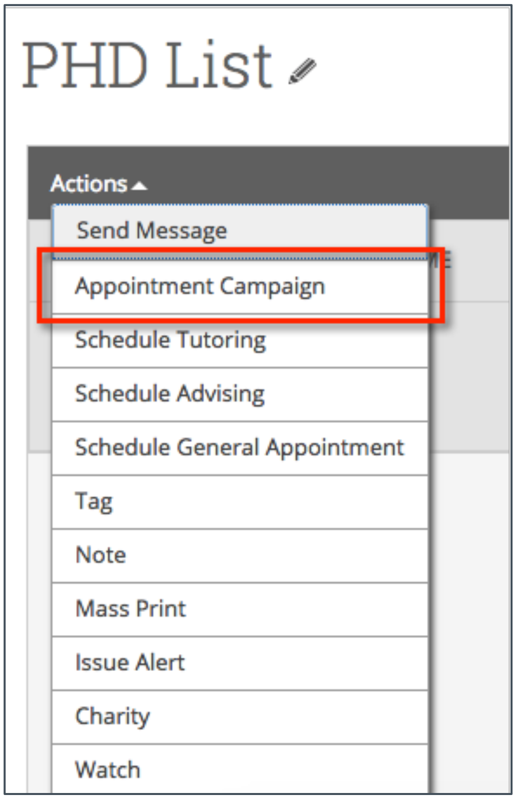


Figure 14. Appointment Campaign in Actions Menu

The New Campaign screen will display and tell you how many students will be added to the campaign. You must then define the campaign by entering the following data:

Campaign Name: The name of the campaign only appears to the advisor. This needs to be a name that makes sense to you.

Campaign Type: Is this an advising or tutoring campaign?

Slots per Time: The number of students you wish to have attend per one appointment slot.

Course or Reason: If there is a reason or associated course for the campaign, select it here

Choose the Begin and End Date: This will be the date range for which you want the students to make their appointments.

Appointment Length: This is where you define exactly how long the appointment will be. Durations begin at a 5-minute length and will be determined by your configuration.

Appointment Limit: This will determine how many appointments you wish for the student to schedule.

Location: Select the location of where the appointment(s) will be held.

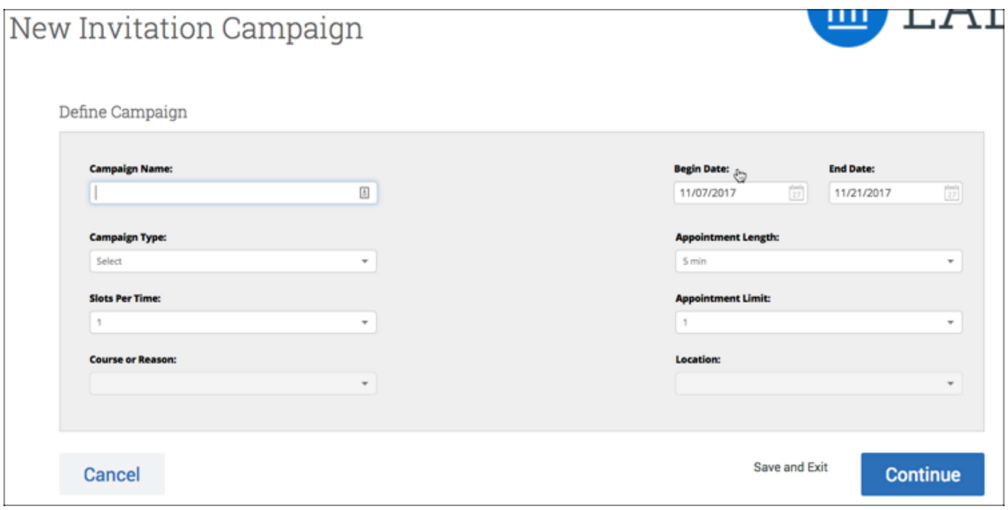


Figure 15. Define Campaign

Click **Continue** to move to the next screen.

Review the students in your campaign and then click **Continue**.

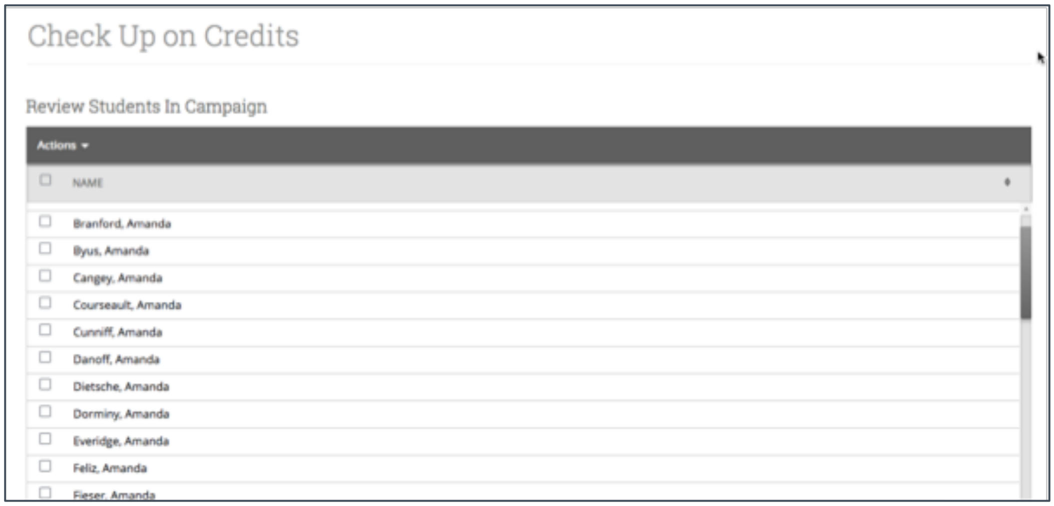


Figure 16. Reviewing Students in Campaign

The next step is adding advisors to the campaign. You will need to select yourself as the advisor for the campaign. You may also have the option to select additional advisors to make them available for appointments based on the campaign. Advisors will need to have availability defined before they can be added to an appointment campaign.

Note: If your school does not use Campaign Availabilities you can check the box to Include Appointment Availabilities to show available advisors. This section will default to search for campaign availabilities first.

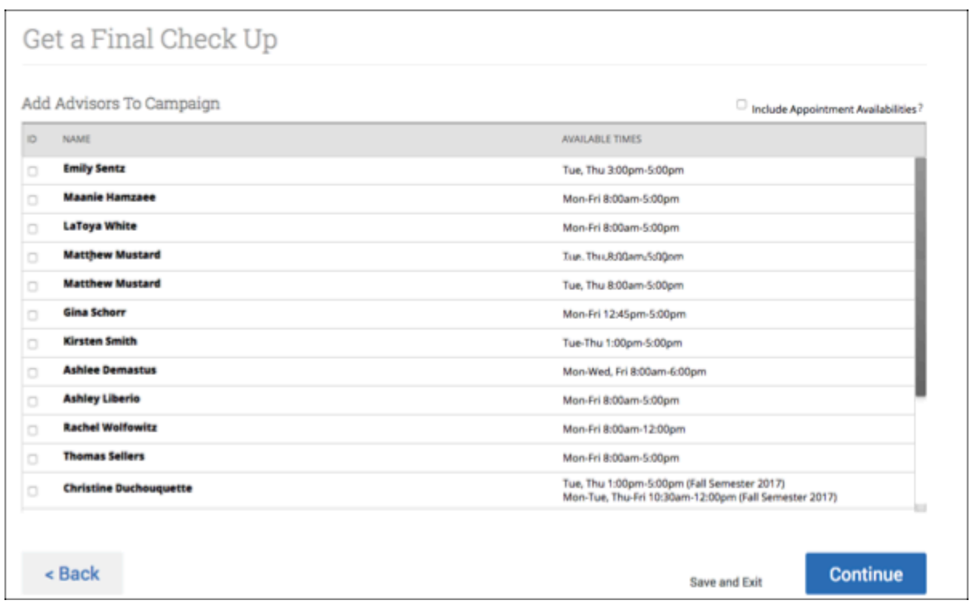


Figure 17. Adding Advisors to Campaign

Click **Continue**. You then will compose a message that will be sent to students for the campaign.

Finally, you will be able to review your options and send out messages, beginning the campaign.