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Navigate Strategic Care 23.2.1 Release Notes

Help Center Manager
8 days ago · Updated

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Pillar: Strategic Care, Recruitment Management, Navigate Staff

Training Release: 18 September 2023
Prod Release Date (Expected): 25 Sept 2023 (Prod A) / 27 Sept 2023 (Prod B)

Release Note Summary: Fixing bugs throughout Navigate Staff. For Recruitment Management, updated permissions, new Application fields, and changes to grids.

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Navigate Staff Platform

Fixes

- Fixed an issue where in some cases, updating a Saved Search would cause it to stop working with an Automated Action, specifically when sending a message.
- Fixed an issue where when using the enter key to select a service for an Appointment Summary Report, the service would not persist in the service field.
- Fixed an issue where there were many more pages of users with a role than would be expected given the number of users with a role.
- Fixed an issue where characters with diacritics/accent marks were being removed from Messaging Campaign nudges.

Recruitment Management

## General Updates

Contacting Prospects Follow Legal Requirements

To fulfill legal requirements, EAB is making sure that your institution has permission to call and text prospects. To do this, we have updated the Prospect so that *OK to Call* and *OK to Text* fields are unchecked by default.

Communication Opt Out		
OK to Email	OK to Call	OK to Text
Yes	No	No

We recommend asking permission to call and text prospects using Inquiry Forms to update these fields.

The default language for the Terms & Conditions text for new inquiry forms has been updated as well. Your institution may alter this text.

Terms & Conditions Text ⭐ ⓘ

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> By submitting, you are agreeing to receive email communications from our
> institution regarding enrollment.

Object Field Grid Improvements

Recruitment Management updated the object field configuration grid. The grid now scrolls, is paginated to show 100 fields per page, and resizes to your screen size.

Application Field Configurations

Based on your Prospect Object Field Configurations, these Prospect fields are required and must be populated as a Field Mapping Destination: **Primary Email, Date Of Birth, First Name, Last Name, Legal First Name**

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☰	FIELD NAME (DEFAULT)	DATA TYPE	CUSTOM FIELD NAME	PROSPECT FIELD MAPPING	ENABLED?	SHOWN IN LIST?	REQUIRED?
☰	Application PM ID	Short Answer (String)			Yes	No	No
☰	Application External ID	Short Answer (String)			Yes	No	No
☰	Application Name	Short Answer (String)			Yes	No	No
☰	Application Status	Single Select (String)		Prospect Status	Yes	Yes	Yes
☰	Submitted At	Date & Time (DateTime)			Yes	No	No
☰	SIS Student ID	Short Answer (String)		SIS Student ID	Yes	No	No
☰	Primary Email	Short Answer (String)		Primary Email	Yes	No	Yes
☰	Date of Birth	Date		Date Of Birth	Yes	No	Yes
☰	Salutation	Single Select (String)			Yes	No	No

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Applications

New Fields for Application

We have added new fields to the Application. There is a set for parents/guardians, a set for counselors, and some for legacy connections.

The new fields are disabled by default so that you can decide if you want them to display. These fields are available via import regardless of whether you enable the fields on the Application Field Configurations page.

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