

Forms Across the Student Life Cycle

Embedded in Every Navigate360 Workflow

Navigate360 Forms help institutions collect the information they need to support students while simplifying administrative processes for staff. From first inquiry through graduation, forms enable institutions to digitize requests, create consistent processes, and deliver seamless experiences across the student lifecycle. The examples below highlight common ways partners can use forms to gather information and automate tailored follow-up across the Student Life Cycle.

WHO CAN COMPLETE NAVIGATE360 FORMS



Students



Staff



Contacts



Prospects

FORMS AS EASY AS 1, 2, 3

- 1 **Build & Publish**
AI Form Builder streamlines migrating existing forms and supports easily creating new forms.
- 2 **Distribute**
Embed in existing Navigate360 features like Campaigns and Student Journeys.
- 3 **Automate Next Steps**
Automate alerts or campaign-inclusion based on form responses.

Recruitment & Enrollment

- ☐ Admission Appeal
- ☐ Application Fee Waiver
- ☐ Deferral Request
- ☐ Inquiry Form
- ☐ Parent Information Request
- ☐ Readmission Interest
- ☐ Test Score Submission
- ☐ Transfer Credit Pre-Evaluation
- ☐ Veteran Benefits Intake

**Learn more about [Enrollment CRM](#)*

Onboarding & Transition

- ☐ Club Organization Interest
- ☐ Communication Preferences
- ☐ Contact Information Update
- ☐ Emergency Contacts
- ☐ Housing Intake Form
- ☐ Policy Acknowledgement
- ☐ Residency Verification
- ☐ Technology Request
- ☐ Transcript Submissions
- ☐ Work Study Interest

Academic Success

- ☐ Academic Integrity Report
- ☐ Academic Probation
- ☐ Academic Recovery Plan
- ☐ Accommodation Request
- ☐ Change of Major
- ☐ Independent Study Request
- ☐ Research Interest
- ☐ SAP Documentation
- ☐ Student Plan
- ☐ Thesis Topic Selection

Student Belonging

- ☐ Career Assessment
- ☐ Graduate Assistantship
- ☐ Housing Change Request
- ☐ Internship Interest
- ☐ Job Shadow Request
- ☐ Mentoring Interest
- ☐ Student Government
- ☐ Student Internship Evaluation
- ☐ Volunteer Interest

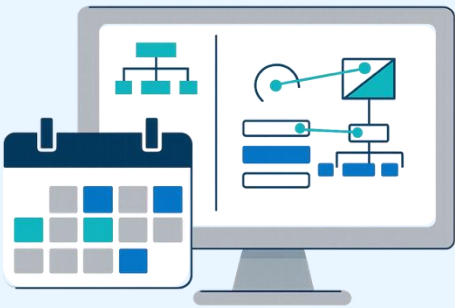
Preparing for Graduation

- ☐ Academic Forgiveness
- ☐ Fellowship Support
- ☐ Final Exam Conflict
- ☐ Grade Appeal
- ☐ Graduate School Interest
- ☐ Graduation Application
- ☐ Leave of Absence
- ☐ Petition to Graduate
- ☐ Senior Engagement Survey
- ☐ Transcript Request

Alumni & Beyond

- ☐ Alumni Awards Nomination
- ☐ Alumni Profile Update
- ☐ Alumni Profiles
- ☐ Career Speaker Interest
- ☐ Continuing Education Interest
- ☐ Diploma Reissue
- ☐ Giving Interest
- ☐ Mentor Interest
- ☐ Volunteer Interest

**Learn more about [Advancement CRM](#)*



Learn More & Get Started

For additional resources including detailed instructions and feature overview video, visit the **Navigate360 Help Center**.

For additional ideas from other Navigate360 institutions, **log in to the Navigate360 Community at [networking.eab.com](#)**.

Why Navigate360 Forms?



Meet users where they already are within Navigate360 for students, faculty, and staff.



Reduce effort for students by leveraging existing Navigate360 information.



Turn information into action by centralizing data and automating interventions.



Guide students to the right forms through the **AI Assistant for Students**.

Forms Across Your Institution

Embedded in Every Navigate360 Workflow

Navigate360 Forms empower every office on campus to collect the information they need from student requests and service intake to internal staff processes. Whether supporting students through admissions, advising, financial aid, and career services or streamlining staff activities like training requests, award nominations, and policy acknowledgements, Forms help create consistent experiences and keep information connected across the institution.

3 Ways Offices Receive Forms



Submitted by
Students



Submitted by
Staff about Students



Submitted by
Staff about Staff

Admissions

- ☐ Communication Preferences
- ☐ Credit Evaluation
- ☐ Deposit Extension Request
- ☐ Emergency Contacts
- ☐ International Student
- ☐ Major Preference Update
- ☐ Prospect Inquiry Form
- ☐ Readmission Interest
- ☐ Test Score Submissions

Financial Aid

- ☐ Emergency Aid Request
- ☐ FAFSA Assistance Request
- ☐ Grant Request
- ☐ Loan Repayment Planning
- ☐ SAP Appeal
- ☐ Scholarship Appeals
- ☐ Tuition Payment Plan
- ☐ Veteran Benefits Intake
- ☐ Work Study Interest

Registrar

- ☐ Change of Major Support
- ☐ Course Substitution
- ☐ Enrollment Verification
- ☐ Final Exam Conflict
- ☐ Graduation Application
- ☐ Intent to Withdraw
- ☐ Name Change
- ☐ Pre-Requisite Challenge
- ☐ Transcript Request

Advising & Student Success

- ☐ Academic Assessment
- ☐ Academic Probation Contract
- ☐ Academic Recovery Plan
- ☐ Concentration Selection
- ☐ Concurrent Enrollment
- ☐ Degree Audit Request
- ☐ Independent Study Interest
- ☐ Mentoring Request
- ☐ Progress Update

Faculty

- ☐ Academic Integrity Report
- ☐ Award Nominations
- ☐ Classroom Accommodation
- ☐ Independent Study Approval
- ☐ Portfolio Submissions
- ☐ Recommendation Letters
- ☐ Research Approval
- ☐ Senior Project Topic
- ☐ Teaching Assistant Requests

Career Services

- ☐ Alumni Mentor Request
- ☐ Career Assessment
- ☐ Employer Evaluation
- ☐ Graduate School Interest
- ☐ Internship Approval
- ☐ Internship Evaluation
- ☐ Internship Registration
- ☐ Job Shadow Request
- ☐ Major Fellowships Support

Student Affairs

- ☐ Guest Registration
- ☐ Housing Appeal
- ☐ Housing Application
- ☐ Leave Notification
- ☐ Meal Plan Change Request
- ☐ Roommate Change Request
- ☐ Student Organization
- ☐ Volunteer Interest

Accessibility Services

- ☐ Accommodation Appeal
- ☐ Accommodation Request
- ☐ Accommodation Renewal
- ☐ Assistive Technology
- ☐ Documentation Support
- ☐ Faculty Notification Request
- ☐ Grievances
- ☐ Interpreter Request
- ☐ Testing Accommodation

International Services

- ☐ Insurance Verification
- ☐ Policy Acknowledgement
- ☐ Pre-Departure Checklist
- ☐ Program Application
- ☐ Re-Entry Reflection
- ☐ Reduce Course Load
- ☐ Study Abroad Intake
- ☐ Visa Status Request
- ☐ Work Authorization Request

Alumni & Advancement

- ☐ Alumni Award Nomination
- ☐ Alumni Profile Update
- ☐ Alumni Profiles
- ☐ Awards
- ☐ Career Speaker Interest
- ☐ Continuing Education
- ☐ Giving Interest
- ☐ Mentor Interest
- ☐ Volunteer Interest

Beyond Student Services: Staff-Only Forms

- ☐ Policy Acknowledgement
- ☐ Professional Development
- ☐ Project Funding Request
- ☐ Staff/Faculty Awards
- ☐ Strategic Initiative Request
- ☐ Technology Equipment Request
- ☐ Training Request
- ☐ User Access Permissions



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