Navigate: Alerts and Case Management Workflow

Important Message About Raising Alerts

An Alert is a notification from Navigate designed to raise awareness that a student is not meeting expectations in some way. Alerts can be raised by instructors for many academic reasons. Alerts should be raised after a faculty member has attempted to reach out to their student(s) AND are requesting additional support(s). If your communication attempt (for example: phone call, email, meeting with a student before or after class) is unsuccessful, then an Alert should be raised so that an additional outreach attempt can be made by the student's assigned Advisor(s). When an Alert is raised, after an unsuccessful attempt of resolving the issue or concern by a faculty member, Advisors treat Alerts as an acknowledgement that additional outreach and/or support is needed.

Advisors will provide Case Outcomes or Case Closure Reasons and comments only after outreach to the student is attempted. This might include a phone call, email or text message explaining the issue, the potential impact, resources available, and solicitation to connect with their faculty member, or Academic Advisor(s).

When selecting an **Outcome** (Case Closure Reason) and leaving comments, it is recommended that you place a check mark next to the box: **Allow closed comments to be shown in email**. These comments are included in the **Case Closed** email that is sent to the faculty member who issued the Alert.

A **Closed *Case*** does not necessarily mean that a student was successfully contacted. For instance, there are times that despite our multiple attempts, a student will not respond to our outreach or intervention. In these instances, the *Case* will be closed with a comment indicating that the *Case* was **unresolved**.

Definitions

1. **Alerts** - are a way to draw attention to a student who might be at risk for a variety of reasons, such as in danger of failing, needing tutoring, or may benefit from taking a course pass-fail.

Note: Alerts raised for students who are Freshmen and Sophomore should be managed by the student's assigned Professional Advsior.

2. A **Case** - is an **Alert** or **Referral** that is assigned to the student's advisor(s), or in some instances, a campus official for further action. Moreover, a Case is an electronic case file where staff across departments (e.g., financial aid, bursar, tutoring, counseling) can coordinate and collaborate on the follow up with the student. Cases create a formalized next step for **action or intervention** on the issued Alert or Referral, should that be needed. The electronic record logs all attempted outreach (failed/successful), and Case Outcomes. Details about the Case, including the the **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page.

What is a Case Assignee? This is **the person the Case is assigned to**. This is the student's assigned advisor(s). In addition, the person could also be a specific staff member assigned to handle certain Cases tied to Alert reasons. For example, if the Alert reason is **Referral – Tutoing Services**, a Case could be automatically assigned to the Director of Tutoring Services. A Financial Aid Alert reason could be assigned to a Financial Aid employee.

Will the Case Assignee be notified when comments are added to the Case? No, the Case Assignee(s) are only notified when the Case is originally opened. There are no push notifications when staff add comments to an open Case.

What information can I put on a Case? General comments can be added to a Case to allow users to view progress around the outcome of the original Alert.

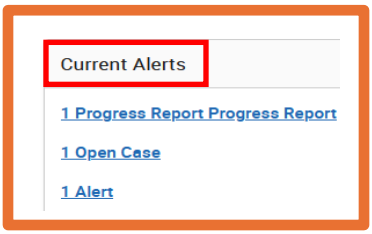
What happens if a student drops a course for which they have an open Case? If an Alert is submitted for a certain course, and then the student drops that course, the Case no longer lists what class the Alert was submitted for. The Case remains open.

Case Management Action Steps

STEP 1 – Except for the **Missing/Late 2+ Assignments** Alert and the **Kudos - Great Effort / Showing Improvement**, all other Alerts will automatically open a **Case** notifying the assigned advisor(s) of the type of assistance needed. Assigned advisor(s) will contact the student and provide additional support and or resources.

STEP 2 – Assigned advisor(s) will record all support and or interventions provided to the student using the **Manage Case** feature in Navigate. **Leaving comments are very important!**

Assigned advisor(s) can access the Manage Case feature from the **Student's Profile** under the **Current Alerts** section on the right side of the Student's Profile and selecting **Open Case(s)**.

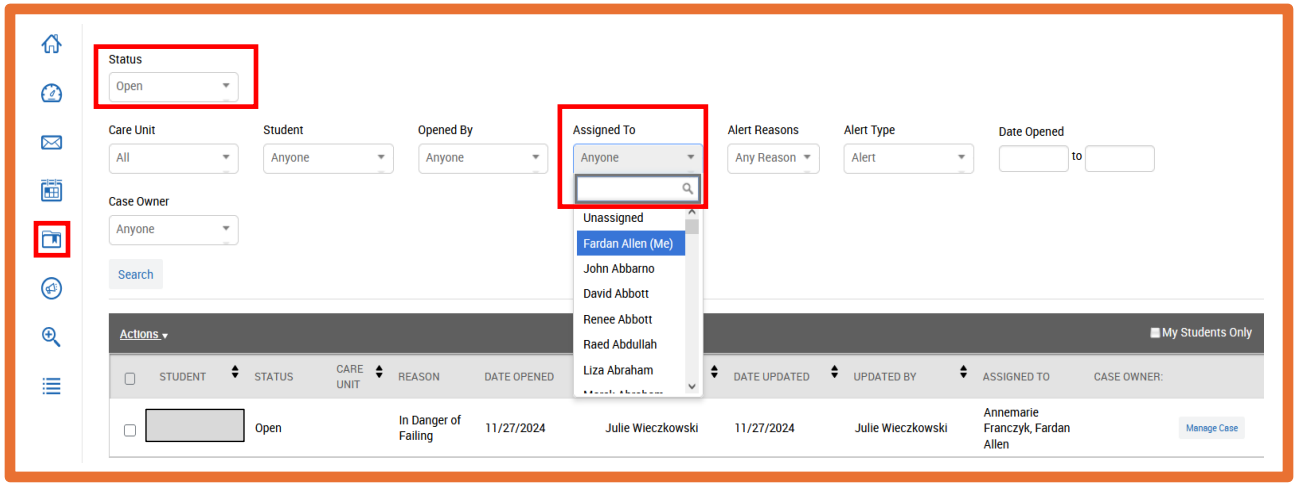


Note: Because the total count includes all **Alerts**, **Cases**, and **Progress Reports**, you may find duplicate information. For example, if one Progress Report issues one Alert, which in turn opens a Case, **the total count is three to include each of those actions**, even though they all originated from the same Progress Report. Be mindful of what the total count means when using that information to inform student interactions or follow up.

Advisors may also view **Cases** that have been assigned to them from their Cases page by clicking on the Cases icon on the left-hand side of their navigation toolbar.

From the screen shot below: (1) In the **Status** box, select Open or Close, (2) In the **Assigned To** box, select your name, and (3) Click the **Search** buton.

This example, will bring up all the Cases that have been assigned to you that are Open or Closed depending on what you set the **Status** at.



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STEP 3 – After assistance has been provided to the student and a resolution has been attempted, Advisor(s) will close the student's Alert Case in Navigate using the **Manage Case** feature.

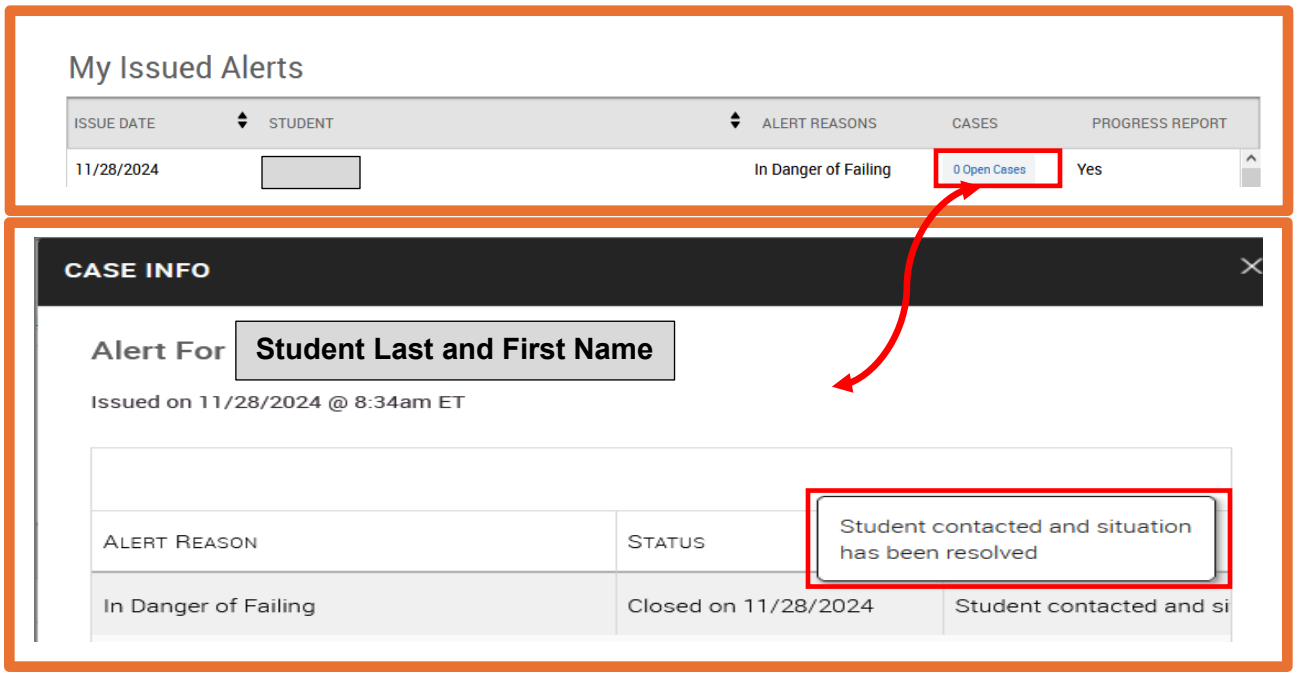
The faculty member who initiated the Case (issued the Alert) will receive an email notification that the Case has been closed and the reason for the Case closing. Essentially, this is Closing the Loop. This is the **Outcome** or **Case Closure Reason.**

Case Outcomes or Case Closure Reasons

1. Student contacted and situation has been resolved.
2. Student contacted multiple times with no response.
3. Student connected with appropriate resource.
4. Student declined assistance.
5. Student has or plans to withdraw from course.
6. End of Term. No resolution.

Note: When selecting an **Outcome** (Case Closure Reason) and leaving comments, it is recommended that you place a check mark next to the box: **Allow closed comments to be shown in email**. These comments are then included in the Case Closed email that is sent to the faculty member who issued the Alert.

Faculty can also view **Case Outcomes** (Case Closure Reasons) from their **Professor Home** page under the **My Issued Alerts** section. Simply click on the link in the **Cases** column to view the **Case Oucome**.



Alerts and Case Management Workflow

Alert	Definition	Alert Type	Alert Location	Care Unit Assigned	Should Student Receive Email Notification	Who Receives a Faculty Email Notification	Does Alert Automatically Open a Case	Does Alert Automatically Get Assigned to advisor(s)
3+ Attendance Absences	Raise this alert when a student isn't attending class regularly.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	Yes	Yes
Attendance - Never Attended Class	Raise this alert to indicate that a student has never attended your class.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	Yes	Yes
Class Engagement Concern	Raise this alert when a student is demonstrating a lack of engagement.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	Yes	Yes
In Danger of Failing	Raise this alert when a student is in danger of failing a course.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	Yes	Yes
Kudos - Great Effort / Showing Improvement	Instructor raises this kudo when a student has shown improvement in a course.	Positive	Issue an Ad Hoc Alert/Progress Report	No	Yes	N/A	**No**	No
Missing/Late 2+ Assignments	Raise this alert when a student is missing or late with two or more assignments.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	**No**	No
Recommend Pass/Fall or Withdrawal	Raise this alert when a student may benefit from taking a course pass-fail or withdrawing from a course.	Negative	Issue an Ad Hoc Alert/Progress Report	No	Yes	Student's Assigned Advisor(s)	Yes	Yes
Referral - Tutoring Services	Raise this referral to refer students to the Academic Center for Excellence for Tutoring.	Neutral	Issue an Ad Hoc Alert/Progress Report	No	Yes	Director of Tutoring Services and Student's Assigned Advisor(s)	Yes	Yes. Including Director of Tutoring Services.

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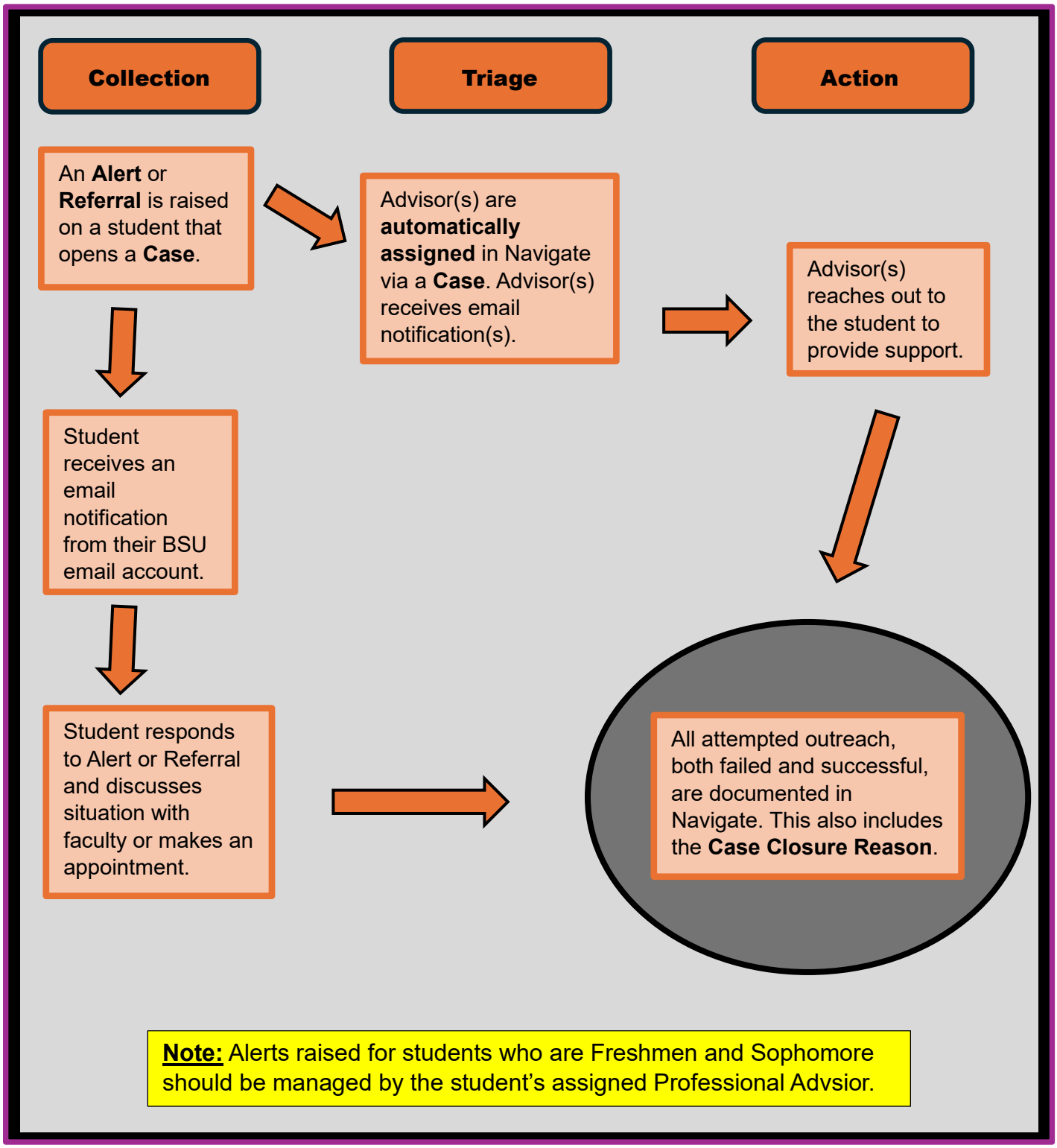
The Early Alert Process Workflow: **Collection, Triange, Action**



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Student Email Notification

From: SUNY - Buffalo State University - Navigate Student Success <no-reply@navigate.eab.com>
Sent: Thursday, November 28, 2024 1:20 PM
To: Hudson, Robert J <hudsonrj@buffalostate.edu>
Subject: Navigate360 Notification: In Danger of Failing

[CAUTION] This email originated from outside of Buffalo State University. Do not click links or open attachments unless you recognize the sender and know the content is safe.

SUNY Buffalo State University

Hi **Student First Name**

Alert Reasons:

In Danger of Failing

According to our feedback from your instructor, you are in danger of failing ANT-100: HUMAN ORIGINS. We recommend that you contact your instructor right away to discuss your options and develop a plan of action. It is important that you connect with them to see what can be done to raise your grade in this course.

Please discuss this situation with your instructor as soon as possible! If additional support is needed, please use Navigate360 to schedule an appointment with the Success Team or review available resources. **Note:** If online scheduling is not available, please visit your instructor during their Office Hours. Their office hours are listed on your course syllabus.

We care about your success! Buffalo State University offers additional resources and support services that can help you improve your academic performance and assist with personal concerns. Please check them out here.

Sincerely,

Your Success Team

Assigned Staff Emai Notification

If a staff or faculty member issues an **Ad Hoc Alert** or issues an Alert via a **Progress Report** on a student and the selected Alert reason has been configured to send **Assigned Staff Emails**, staff assigned to the student receives the following email message from the Navigate platform notifying them of the issued Alert.

Advisor(s) Receive Email Notification that a Case Has Been Assigned to Them.

From: Julie Wieczkowski <wieczkja@buffalostate.campus-training2.eab.com>
Sent: Thursday, November 28, 2024 1:20 PM
To: Hudson, Robert J <hudsonrj@buffalostate.edu>
Subject: [Case Assigned] In Danger of Failing for **Student First and Last Name**

[CAUTION] This email originated from outside of Buffalo State University. Do not click links or open attachments unless you recognize the sender and know the content is safe.

SUNY Buffalo State University

A Case has been Assigned to You

Student

Student First and Last Name

Alert Reasons

In Danger of Failing

Alert Issued By

Julie Wieczkowski

Note: If you click the **View Case Details** link, you will be taken directly to the student's **Manage Case** dialog box in Navigate where you can view the details of the Case. You can also provide comments in an effort to support the student.

You may be prompt to sign in to your Navigate account with your **Username** and **Network** password.

View Case Details

You can also copy and paste this address into your web browser

https://buffalostate.campus-training2.eab.com/cases?case=22-in_danger_of_failing

Note: If you click the link, you will be taken directly to the student's Manage Case dialog box in Navigate where you can view the details of the Case. You can also provide comments in an effort to support the student.

You may be prompt to sign in to your Navigate account with your **Username** and **Network** password.

Case Closed Email Notification Sent to Faculty Member who Issued the Alert

From: SUNY - Buffalo State University - Navigate Student Success <no-reply@navigate.eab.com>
Sent: Thursday, November 28, 2024 1:26 PM
To: Hudson, Robert J <hudsonrj@buffalostate.edu>
Subject: Case Closed: **Student First and Last Name**

[CAUTION] This email originated from outside of Buffalo State University. Do not click links or open attachments unless you recognize the sender and know the content is safe.

SUNY Buffalo State University

Case Closed: **Student First and Last Name**

Recently, you issued an Alert for one of your students. We wanted to share with you the outcome of the case. The Alert was for:

ANT-100: HUMAN ORIGINS

Student

Student First and Last Name

Alert Reasons

In Danger of Failing

Alert Issued on

November 28

Case Outcome Student contacted and situation has been resolved

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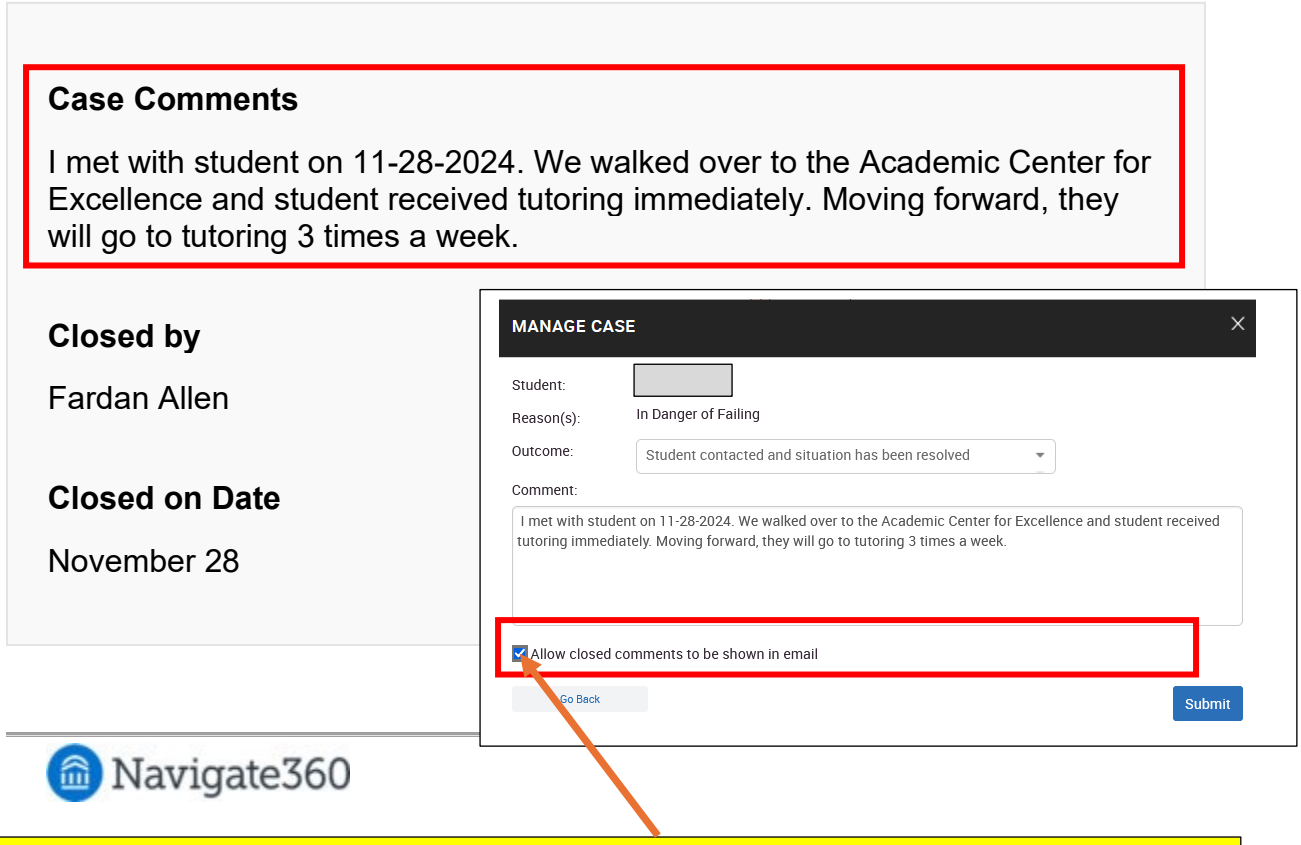

<u>Note:</u> When selecting an **Outcome** (Case Closure Reason) and leaving comments, it is recommended that you place a check mark next to the box: **Allow closed comments to be shown in email**. These comments are included in the **Case Closed** email that is sent to the faculty member who issued the Alert.

<u>Note:</u> After a **Case** is closed, the faculty member who submitted the **<u>initial *Alert*</u>** will receive a **Case Closed** email notification. When a Case is closed, it is assigned a ***Case Outcome***. The email will identify the specific Case which has been closed and will include a *Case Outcome*. Each *Case* will generate its own email when closed.

*If you need to discuss the Case further, please reach out to the advisor(s) who closed the case.

<u>Important</u>: A **Closed *Case*** does not necessarily mean that a student was successfully contacted. For instance, there are times that despite our multiple attempts, a student will not respond to our outreach or intervention. In these instances, the *Case* will be closed with a comment indicating that the *Case* was **unresolved**.

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