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The State University of New York

Navigate360

## Navigate: How to Raise an Ad Hoc Alert

Submitting an Ad Hoc Alert

Navigate's **Ad Hoc Alerts** are used by faculty and staff to share critical information and to create referrals for students between support offices. Use the instructions below to submit an Alert and initiate support for a student.

You can issue an Alert for a student two different ways in Navigate: 1) **Ad Hoc** or 2) through a **Progress Report**. This document will focus on raising an Ad Hoc Alert.

There are several locations to issue Ad Hoc Alerts in Navigate. They include: the **Staff Home** or **Professor Home** pages, in **Advanced Search** results, or from a **Student Profile**.
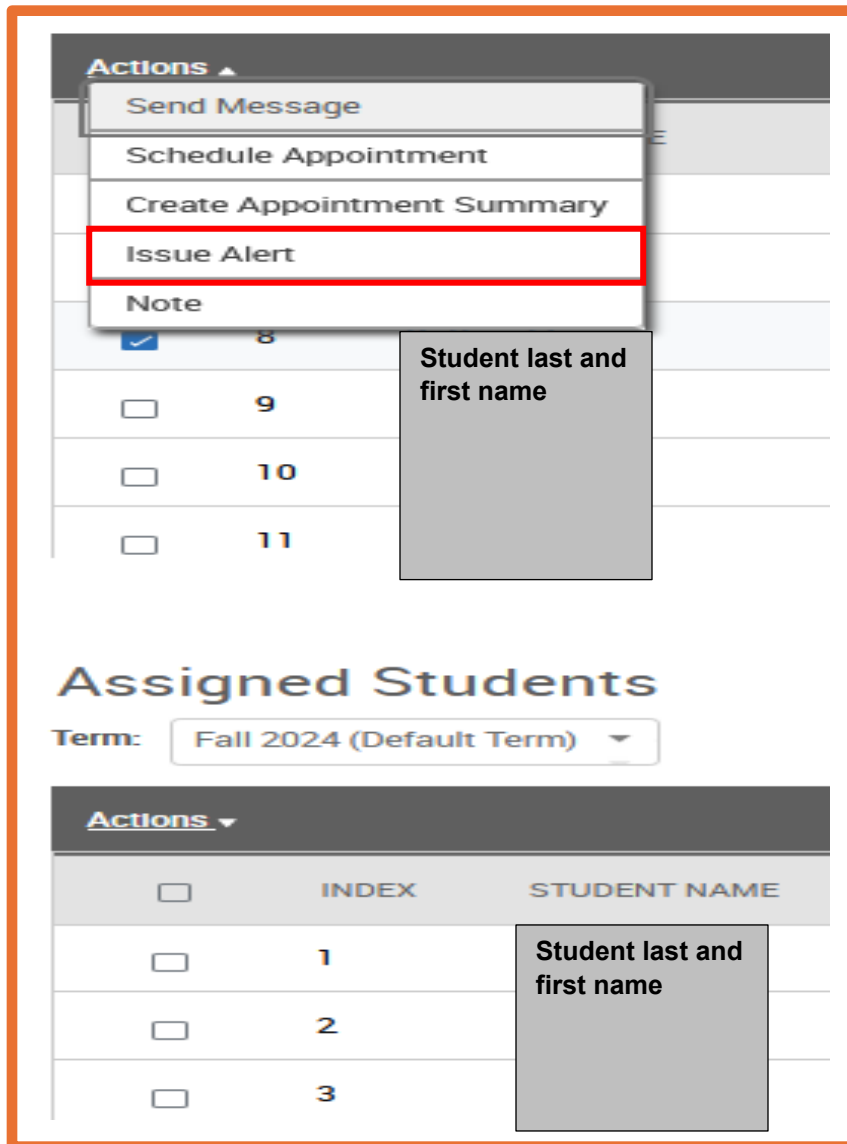
To issue an Ad Hoc Alert from your **Staff Home** or **Professor Home** page, select a student by placing a checkmark next to their name and then select **Issue Alert** from the **Actions** drop-down menu. For this demonstration, we are going to raise an Alert from the **Professor Home** page.
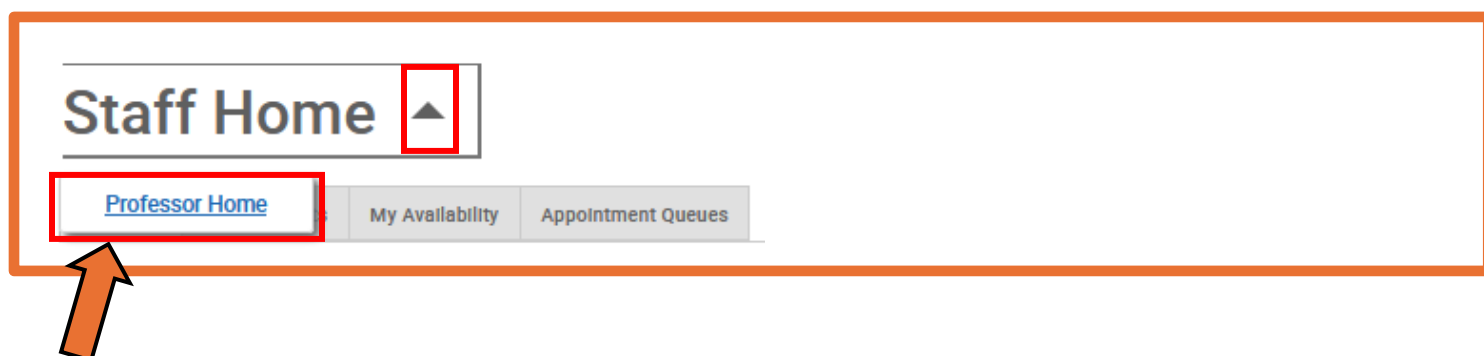
The **Professor Home** page is divided into the following sections:

1. **Courses** – here you will see a listing of all your courses you are teaching for the current term
2. **Students in My Courses** – this sections will include all your students in all the courses you are teaching for the current term.
3. **Assigned Students** - this section will include all students you have been assigned to as an academic advisor. The assigned caseoad is for the current term.
4. **My Issued Alerts** – this section will show all your issued Alerts for the current term.

To issue an Alert on a student, please go to either the **Students In My Courses** section or the **Assigned Students** section. Then find the student and place a checkmark next to their name and then select **Issue Alert** from the **Actions** drop-down menu and follow the prompts in the dialog box.

1. **Alert Reason:** Select at least one reason for issuing this Alert. Alert Reasons have been configured.
2. **Association with Specific Course** (Optional): Select a course from the list if the Alert is associated with a specific course the student is currently enrolled in.
3. **Additional Comments:** Enter comments in this box. Staff and faculty with permission can view the Alert and its comments. There is no character limit to this field. Including **comments** will provide additional details that will help an advisor follow up with the student. When an Ad-Hoc Alert is raised, **students will not see these comments.**

When you select an Alert Reason when issuing an Ad Hoc Alert, details and the actions that will take place are shown. If you select more than one Alert Reason, each reason's details will show beneath **Additional Comments**. This also shows if the Alert opens a **Case**.

To minimize the volume of emails received by both **students** and **staff** regarding Alerts we are asking instructors to do the following:

- For students, where you as the instructor have multiple concerns, please raise the most pertinent Alert, such as Recommend Pass/Fail or Withdrawal.

- Then rather than submit additional cases for the same student we are asking you to include these concerns in the comment field that is available.
  - Options might include 3+ Attendance Absences, In Danger of Failing, and Missing/Late 2+ Assignments or any other pertinent information.

- This clarity will streamline the process within Navigate and yet the advisor can still discuss all of your concerns at the same time.

ISSUE ALERT   ✕

Student   **Student first, last name**

Please select a reason   Select at least one

Is this associated with a specific class?   Optional ▾

Additional Comments

Please enter a comment.

Cancel   **Submit**

ISSUE ALERT   ✕

Student   **Student first, last name**

Select the appropriate Alert Reason from the drop-down menu.

Please select a reason

Is this associated with a specific class?

Additional Comments

Please enter a comment.

- Attendance - Excessive Absences
- Attendance - Never Attended Class
- Class Engagement Concern
- In Danger of Failing
- Missing/Late 2+ Assignments
- Recommend Pass/Fall or Withdrawal
- **Referral - Tutoring Services**

Cancel   **Submit**

ISSUE ALERT   ✕

Student   **Student first, last name**

Please select a reason   ☒ In Danger of Failing |

Is this associated with a specific class?   Optional   ▼

🔍

Spring 2025
  DES-314-01-LEC HIS GRAPHIC DES
  HON-303-02-SEM DIVERSITY SEMINAR
  DES-307-01-STU COLOR THEORY
  DES-380-01-LL ILLUSTRATION
  DES-370-02-STU VISUAL COM 2
Fall 2024
  DES-271-0-STU LETTER/TYPOG 1

Additional Comments

Please enter a comment.

Below you will find the details for each Alert Reas

In Danger of Failing:

- Student will receive an email
- An email will be sent to the student's assigned: Professional Academic Advisor
- A case will be opened and assigned to a staff

Cancel   **Submit**

ISSUE ALERT   ✕

Student   **Student first, last name**

Please select a reason   ☒ In Danger of Failing

Is this associated with a specific class?   DES-271-0-STU LETTER/TYPOG 1   ▼

Additional Comments

Enter any relevant comments you would like the academic advisor to know so that they can assist the student.

Below you will find the details for each Alert Reason chosen and what action(s) will be taken.

In Danger of Failing:

- Student will receive an email
- An email will be sent to the student's assigned: Professional Academic Advisor
- A case will be opened and assigned to a staff

Cancel   **Submit**

When you select an Alert Reason when issuing an Ad Hoc Alert, details and the actions that will take place are shown. If you select more than one Alert Reason, each reason's details will show beneath Additional Comments. This also shows if the Alert opens a Case.

Hit the Submit button.

You can view the Alert that was just raised on your **Professor Home** page under your **My Issued Alerts** section.

In this example, you can see that an **Ad Hoc Alert** for **In Danger of Failing** was raised. We know that this was an Ad Hoc Alert because in the Progress Report column it states, **No Progress Report**.

Some Alerts, such as In Danger of Failing, are configured to automatically open a **Case**. 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 **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page.

If the Case is closed, you may view the **Case Closure Reason** by clicking on the blue link under the Cases column. More information about this is below in the section called, **Where can I view all my issued alerts that I have raised?**

To Issue an Alert from the Student Profile

From either your **Professor Home** or your **Staff Home** page:

1. Locate the student you wish to raise an Ad Hoc Alert for. From your **Professor Home** page, you can either:
   a. view the **Students in My Courses** section or
   b. view student from the **Assigned Students** section

2. From your **Staff Home** page, you can view your **Assigned Students** for the

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current term. As previously discussed, if you have an advisement caseload, you can view your Assigned Students from your Staff Home page. Depending on the nature of your advisement caseload, you can also change the Relationship Type. **Relationship Types** determine advisement caseloads and which students you see under each specific Relationship Type. For example, the **Academic Minor Advisor Relationship Type** will most likely bring up a different list of students compared to your **Major Faculty Advisor Relationship Type**. If the Relationship Type is set to **All Relationship Types**, then you will see all your Assigned Students from both the Academic Minor Advisor and Major Faculty Advisor Relationship Types.

Staff Home ▼

| Students | Appointments | My Availability | Appointment Queues |

Assigned Students

List Type: Assigned Students ▼   Term: Fall 2024 (Default Term) ▼   Relationship Type: All Relationship Types ▼

All Relationship Types
Academic Minor Advisor
Major Faculty Advisor

Actions ▼

| ☐ NAME | ID | STUDENT LIST | CUMULATIVE GPA | CATEGORY | AT RISK? |

Staff Home ▼

| Students | Appointments | My Availability | Appointment Queues |

Assigned Students

List Type: Assigned Students ▼   Term: Fall 2024 (Default Term) ▼   Relationship Type: All Relationship Types ▼

Actions ▼

| ☐ NAME | ID | STUDENT LIST | CUMULATIVE GPA | CATEGORY | AT RISK? |
| 1. ☐ | | | | | No |

Student last and first name

Click on the student's name. Once you click in their name, you will be taken to that specific Student's Profile.
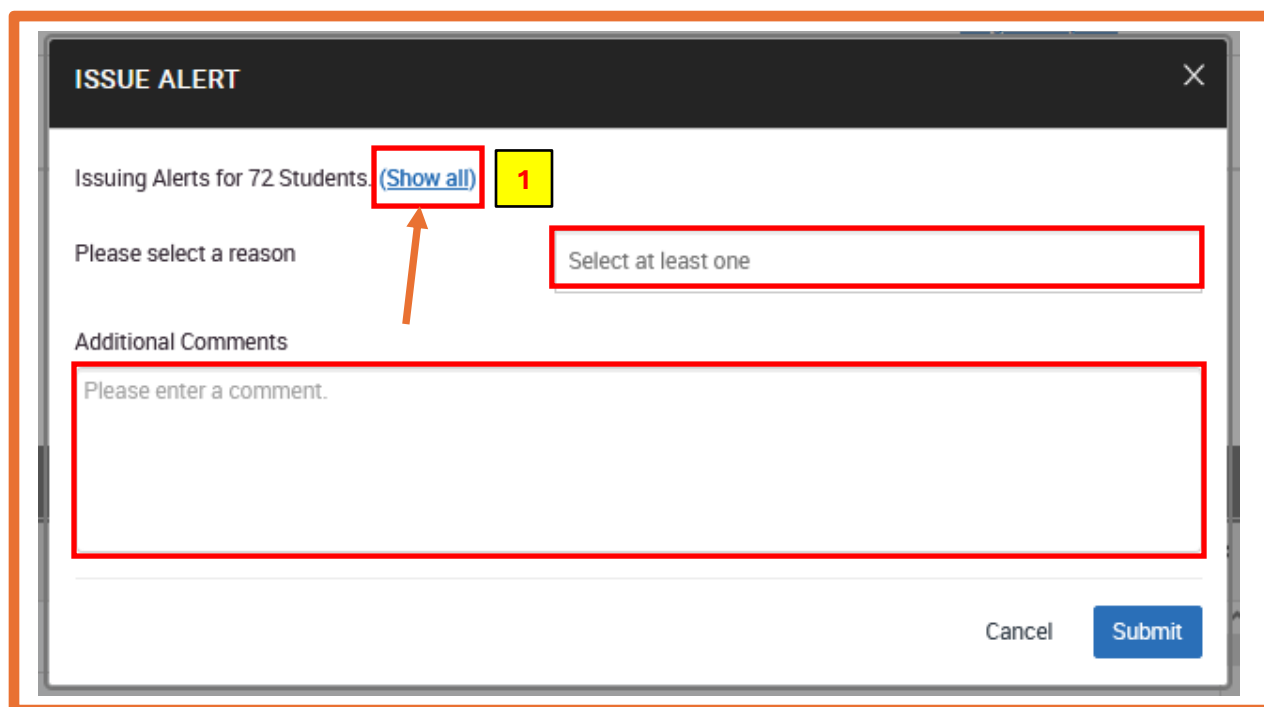
Issuing Mass Alerts

Navigate lets users issue mass Alerts for up to **100 students** at a time. The Alerts generate one Alert per student.

This is available in **Advanced Search**, **Staff Home, Professor Home** Standard Reports, and other drop-down menus where you are able to issue a single Alert from the **Actions** menu.

If multiple students are selected, the dialog is similar to the one for issuing a single Alert. There are two main differences:

1. First, you see **Issuing Alert for X Students** with a link to show a list of all the students.
2. The other difference is there should be **no course selection drop-down**. You will see the actions the **Alert Reason(s)** trigger beneath the **Additional Comments** field as well.

Alert Email Notifications

Depending on your institution's configurations, the assigned advisor(s) and/or student may receive email notifications about the Alert. Your institution may choose to send both, one, or neither of these notification emails, configured for each Alert reason. If you have questions about what notification emails are being sent for your institution's Alert Reasons, contact your Application Administrator.
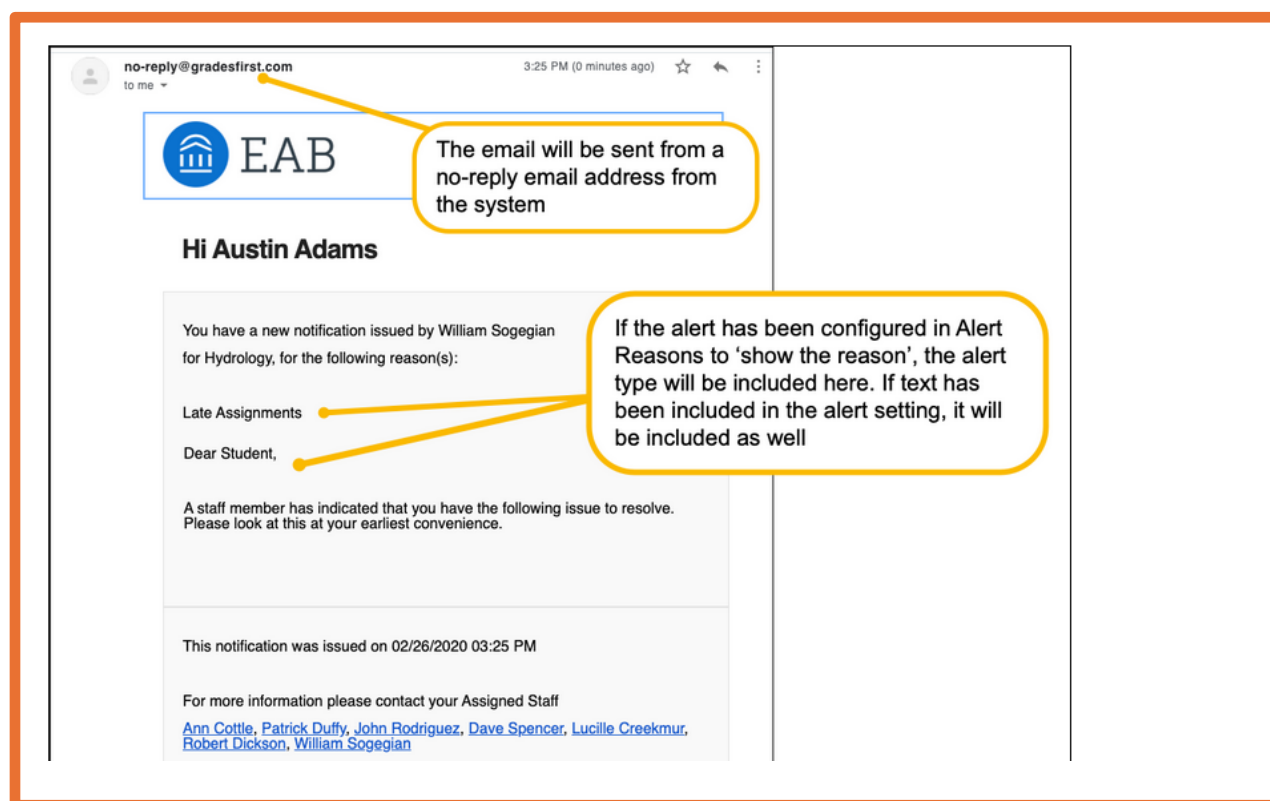
Student Email Notifications

If a staff or faculty member issues an Alert on a student and the selected Alert has been configured to send student emails, the student receives the following email message from the Navigate platform notifying them that an Alert has been issued. **If multiple Alerts are issued at once for a single student, a separate email notification will be sent for each Alert.**

To minimize the volume of emails received by both **students** and **staff** regarding Alerts we are asking instructors to do the following:

- For students, where you as the instructor have multiple concerns, please raise the most pertinent Alert, such as Recommend Pass/Fail or Withdrawal.

- Then rather than submit additional cases for the same student we are asking you to include these concerns in the comment field that is available.
  - Options might include 3+ Attendance Absences, In Danger of Failing, and Missing/Late 2+ Assignments or any other pertinent information.

- This clarity will streamline the process within Navigate and yet the advisor can still discuss all of your concerns at the same time.

This message below is simply an example and may look different for our institution.
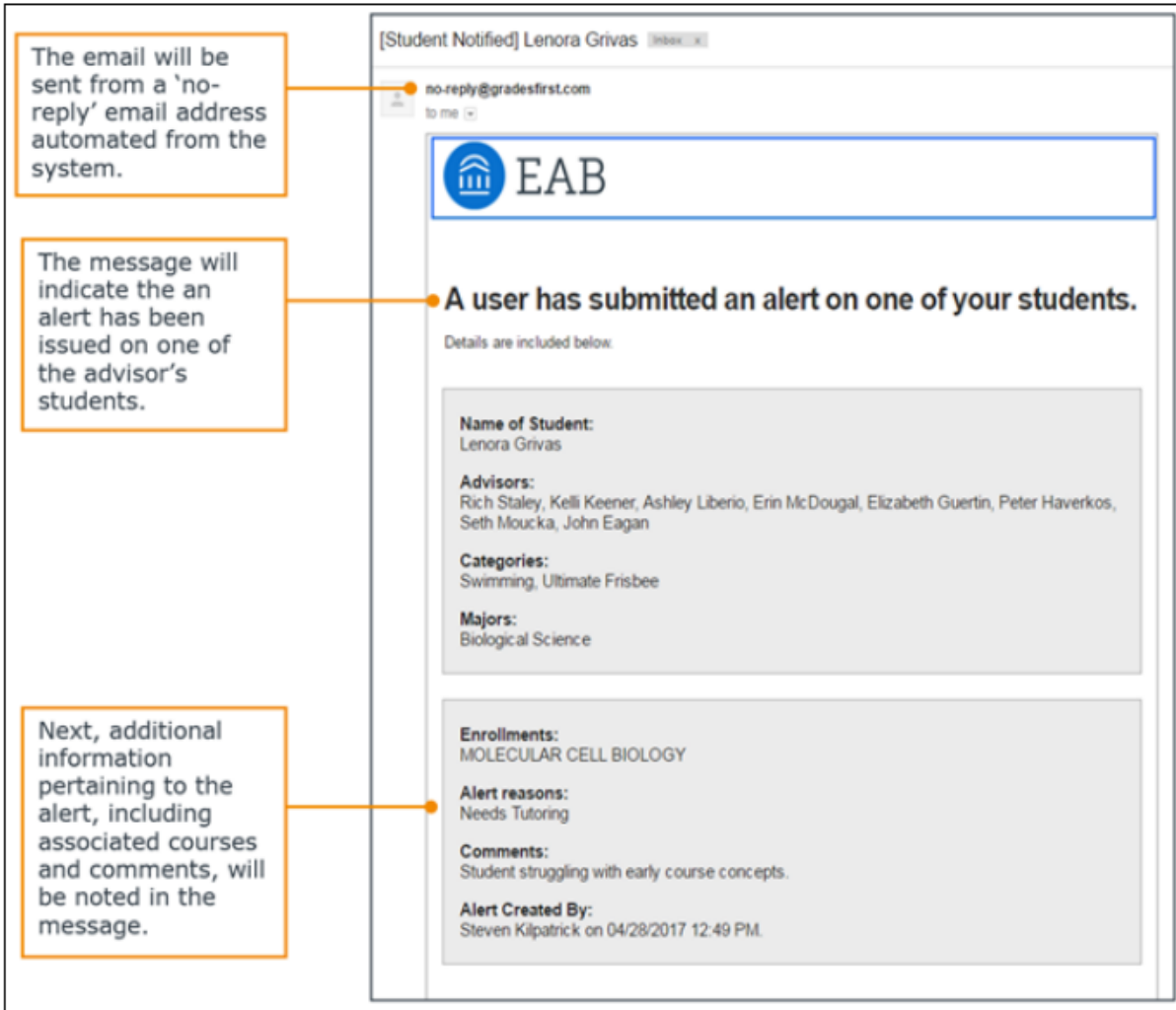
Assigned Staff Emai Notification

If a staff or faculty member issues an Alert on a student and the selected Alert Reason has been configured to send **Assigned Staff Emails**, staff assigned to the student who have been selected to receive notifications for the **Alert Reason** receives the following email message from the Navigate platform notifying them of the issued Alert.

You can email a student directly from an at-risk email triggered by a fellow staff user issuing an Alert on a student or from an Alert triggered by a Progress Report. Click their name to create an email.

This message below is simply an example and may look different for our institution.

Viewing Alerts

There are mainly two ways to view issued Alerts on a student through Navigate:

1. The Student Profile
2. The Professor Home page

Note: You **cannot** view Alerts you have issued on your **Staff Home** page.

Student Profile

To view Alerts on the **Student Profile**, click on the name of the student to be taken to their Student Profile. **On the right side of the Student Profile, the total number of staff Alerts for that student is listed at the top right.** This count includes all Alerts, Cases, and Progress Reports issued for the student for the *current term*.
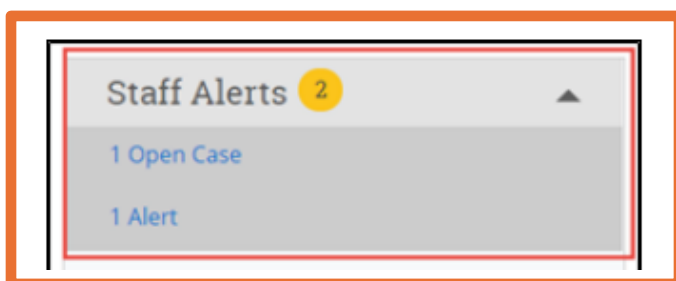
Note: Because the total count includes all Alerts, Cases, and Progress Reports, you may find duplicate information. For example, if one Progress Report issues one Alert, which in turn opens a Case, the total count will be three to include each of those actions, even though they all originated from the same Progress Report.

Be mindful of what the total count means when using this information to inform student interactions or follow up.

To view additional information about the issued Alerts, either click directly on the *2 Alert* hyperlink from the total count or go to the **History** tab of the student profile.

History Tab

On this **History** tab, you can see the Alerts you have permission to see. Please see the screenshots below.
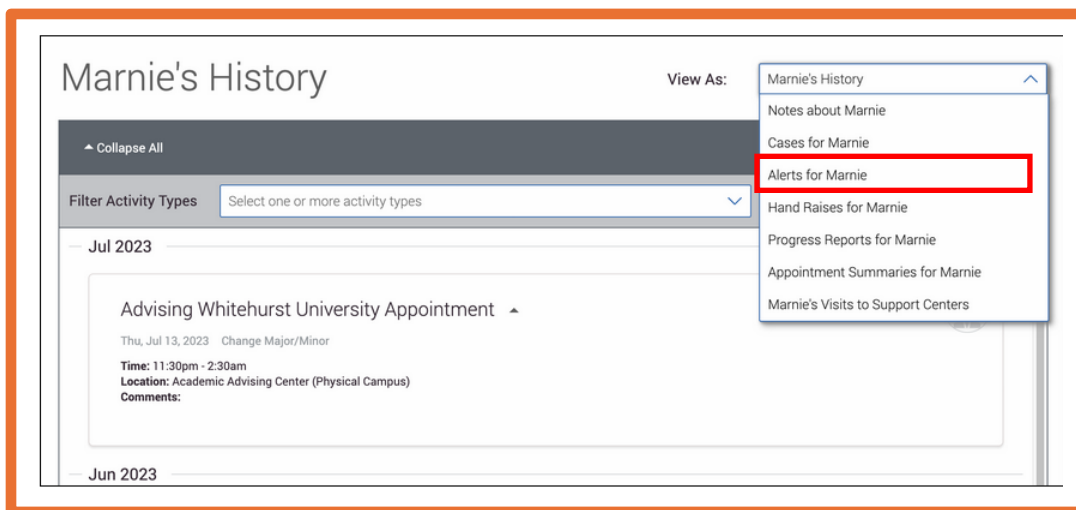
Note: If you are viewing the **History** feed but would instead like to view all Alerts together, select the drop-down menu at the top of the History feed, and choose Alerts for [Student's Name]. This only shows the Alerts section view.

Information provided in the **Alerts section** includes:

Alert Reasons: All reasons associated with this Alert. This is also controlled by Care Unit and permissions configurations.

Issued On: Date in which the Alert was issued.

Issued By: Who issued the Alert.

Comments: Any comments **originally** entered when the Alert was issued.

Associated Case: If the Alert was configured to automatically open a Case, or a Case was manually opened, a link to the Case displays here. Information available in the Case dialogue box includes the Case Owner, Case Assignee, and Case Activity. You may or may not have permission to view or manage the Case.

Issuing Evaluation: If the Alert was issued through a Progress Report, then additional information is available here, including the course, if the student is at risk to fail the course, absences, current grade, and professor comments. You may or may not have permission to view the Progress Report details and the information included within may differ based on our institution's specific configurations.

Professor Home Page

Issued Alerts show on the **Professor Home** page in the **My Issued Alerts** section. This allows faculty to see Alerts they have issued in Navigate, including links to any associated **Progress Reports** or **Cases**. Please see the screenshots in the next section.

If a Case has been opened, faculty can click the Case link and see a window that explains which Alert Reasons opened the Case, the status of each Case, and the **Case Outcome** (Case Closure Reason), if the case has been closed. If the Alert is linked to a Progress Report, the faculty member can open the report. More details below.

Where can I view all my issued alerts that I have raised?

You may view all your issued Alerts that you have raised from your **Professor Home** page under the section called, **My Issued Alerts**.

ISSUE DATE	STUDENT	ALERT REASONS	CASES	PROGRESS REPORT
11/23/2024	Student last and first name	In Danger of Failing	0 Open Cases	Yes
11/23/2024		Attendance - Excessive Absences, In Danger of Failing	1 Open Case	Yes

As previously discussed, some Alerts, such as In Danger of Failing, are configured to automatically open a **Case.** 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 **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page.

If the Case is closed, you may view the **Case Closure Reason** by clicking on the blue link under the Cases column.

Alerts For | Student first name

ISSUE DATE	ALERT REASONS	ISSUED BY	COMMENTS	CASES	PROGRESS REPORT	ACTIONS
12/23/2024	In Danger of Failing	Sara Reese	Test.	0 Open Cases	No Progress Report	

CASE INFO ✕

Alert For | Student last and first name

Issued on 12/23/2024 @ 2:47pm ET

ALERT REASON	STATUS	
		Student contacted and situation has been resolved.
In Danger of Failing	Closed on 12/23/2024	Student contacted and si