



EAB

Navigate Winter Intensive

Alerts & Cases Configurations

Today's Presenters



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Welcome to our Winter Navigate Intensive!



Hands on workshop series on Alerts & Cases Configurations

February						
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■ Feature Spotlight – Alerts & Cases

Includes end-to-end early alerts best practices and case studies

Find Recording [in the Help Center](#)

■ Configuration Intensive General Workshop Session

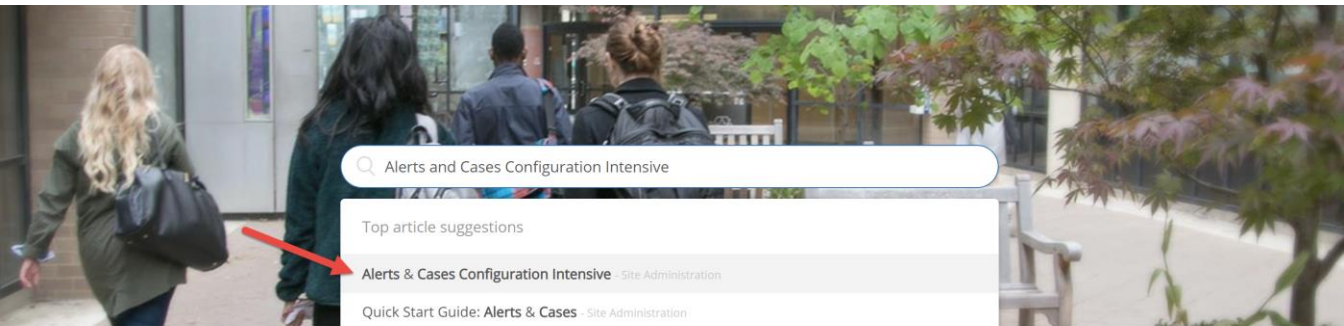
Find Recording [in the Help Center](#)

■ Configuration Intensive Follow Up Q&A

Tuesday, February 16th: 2-3pm EST

Where to find today's materials

Search for 'Alerts & Cases Configuration Intensive' in the Help Center



Platform Information

Feature Index

Learn about Navigate's features across all three pillars - Strategic Care, Smart Guidance, and Intelligence.

Actions and Workflows

Explore common workflows in the platform and learn more about the features to support your goals.

Troubleshooting and FAQ

Find help articles based on common questions or issues.

- 1 Outline Early Alerts Process in Navigate
- 2 Example Alert & Intervention Pathways
- 3 Configure Alerts & Intervention Pathways in Site
- 4 Important Role Permissions
- 5 End User Experience
- 6 Resources & Next Steps

Early Alerts = Process + People + Technology

Navigate Technology can help coordinate people and facilitate processes



Process

- Sharing standards for submitting feedback
- Creating referral and transition policies
- Coordinated communication processes

People

- Faculty
- Advisors
- Financial Aid
- Counseling
- Tutoring
- Etc...

Technology

- Enables **processes** to be carried out by **people** efficiently and effectively

Requires People, Process, and Technology



Navigate is the Technology that will help facilitate efficient processes

Process

- Sharing standards for submitting feedback
- Creating referral and transition policies
- Coordinated communication processes

People

- Faculty
- Advisors
- Financial Aid
- Counseling
- Tutoring
- Etc...

Technology

- Enables **processes** to be carried out by **people** efficiently and effectively



Watch the recording from our January 26th Feature Spotlight for more!



This will be our focus for today!

Stages of the Early Alert Pipeline



Outline your ideal process, identify your people



Set Goals

What are you hoping to accomplish by implementing or restructuring your early alert process?



Collect

Collect Feedback on students



Triage

Triage feedback to the identified support individual



Act

Design & execute Intervention Pathways for uniform next steps



Assessment

Have you accomplished your goal?
Review, tweak, repeat



Stages of the Early Alert Pipeline



This is where Navigate comes in...



Collect
Collect Feedback
on students

Facilitate collection
through the
submission of
Alerts



Triage
Triage feedback
to the identified
support
individual

Automate triage of
alerts



Act
Design & execute
Intervention
Pathways for
uniform next
steps

Document actions
and outcomes
through **Cases**

Defining Navigate Terms

We'll use these words a lot...so it is important to understand what they mean!



Alerts

- Feedback submitted about a student from support staff is called an **alert**



Progress Reports

- Progress reports are a course specific method of alert submission
- Proactively request course-based feedback from faculty through a Progress Report Campaign



Cases

- Formal documentation and management of actions taken from an alert are done through a **case**

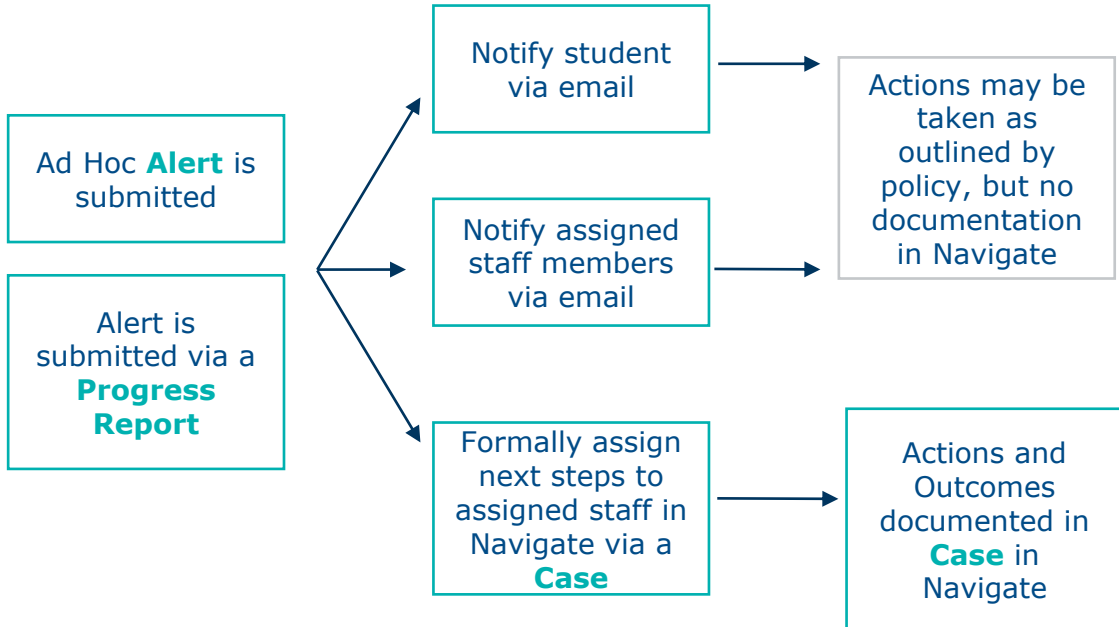
How Navigate Supports Early Alert Processes



Collection

Triage

Action





Example Alert & Intervention Pathways

Woodley University



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Example is from Pre-Work

Attached to 'Alerts & Cases Configuration Intensive' Article in Help Center



Navigate Intensive Pre-Work: EXAMPLE

Example:

- This is an example of a completed pre-work sheet from our sample school, Woodsley University.
- Woodsley University has been using Navigate to facilitate the coordination of End-To-End Early Alerts
- See Woodsley's answers to the pre-work below

High Level Early Alert Management Audit

Alert Reason	Triggers One or multiple of the alert will occur	Intervention Describe the expected intervention
Alert Reason #1: 3+ Absences	Alert triggers event <input type="checkbox"/> No event <input checked="" type="checkbox"/> Event Assigned Staff <input checked="" type="checkbox"/> Event Student Alert Creates a Case? <input checked="" type="checkbox"/> No Case <input type="checkbox"/> Yes to assigned staff member <input type="checkbox"/> Yes to a Tutorable individual	- No case or formal intervention required - Alert staff email to student letting them know faculty notified they were out in class - Email to include link to additional resources (tutoring center, tutoring center, how to schedule an appointment to tutorize) - Email to include overview of attendance policy
Alert Reason #2: Referral to Tutoring	Alert triggers event <input type="checkbox"/> No event <input checked="" type="checkbox"/> Event Assigned Staff <input checked="" type="checkbox"/> Event Student Alert Creates a Case? <input type="checkbox"/> No Case <input type="checkbox"/> Yes to assigned staff member <input type="checkbox"/> Yes to a Tutorable individual	- Alert staff email to student with tutoring website link and instructions to set up a Tutoring appointment with faculty - Alert staff case creation - auto-assign case to their Coordinator (Tina Stangor, tstangor@woodsley.edu) - Email invitation to meet an appointment casepage https://www.navigate2u.com/cases to schedule appointment - Email appointment to be assigned, case is closed
Alert Reason #3: Concern about Remote Education	Alert triggers event <input type="checkbox"/> No event <input checked="" type="checkbox"/> Event Assigned Staff <input checked="" type="checkbox"/> Event Student Alert Creates a Case? <input type="checkbox"/> No Case <input checked="" type="checkbox"/> Yes to assigned staff member <input type="checkbox"/> Yes to a Tutorable individual	- Alert staff email to student letting them know of tutoring hours and available live resources - Alert staff case creation - auto-assign case to student's advisor - Advisor requested to call each student by the end of each week and discuss personalized resource options - Advisor to document approach, email steps, outcomes. Then close case
Alert Reason #4: Recognizing Good Work	Alert triggers event <input type="checkbox"/> No event <input checked="" type="checkbox"/> Event Assigned Staff <input checked="" type="checkbox"/> Event Student Alert Creates a Case? <input type="checkbox"/> No Case <input type="checkbox"/> Yes to assigned staff member <input type="checkbox"/> Yes to a Tutorable individual	- No case or formal intervention required - Alert staff email to student letting them know their professor noticed their good work in class and encouraging them to keep it up - Alert staff email to student's assigned staff members (Advisor, Coach) so staff is aware and can congratulate student
Alert Reason #5: Non-Academic Concern	Alert triggers event <input checked="" type="checkbox"/> No event <input checked="" type="checkbox"/> Event Assigned Staff <input checked="" type="checkbox"/> Event Student Alert Creates a Case? <input type="checkbox"/> No Case <input type="checkbox"/> Yes to assigned staff member <input checked="" type="checkbox"/> Yes to a Tutorable individual	- No automated needs - Alert staff case creation - auto-assign to Dean of Student - Dean of Student to reach out to each student and work on a safety plan first - Dean of Student to document approach, email steps, outcomes. Then close case - No Navigate alert besides the Dean of Student should have access to case notes

Sample Alert Reasons



Alert reasons should be specific and unique

1 3+ Absences



More specific than 'Excessive Absences'

2 Referral to Tutoring



Combines 'Poor Grades' & 'Missing Assignments'
Details a specific next step

3 Remote Education Concern



Denotes a specific intervention pathway

4 Recognizing Good Work

5 Non-Academic Concern

Alert reasons = collection process



Collect
Collect Feedback
on students

Support staff will submit one of the following alerts to provide feedback on students

- 3+ Absences
- Referral to Tutoring
- Remote Education Concern
- Recognizing Good Work
- Non-Academic Concern



Triage
Triage feedback
to the identified
support
individual



Act
Design & execute
Intervention
Pathways for
uniform next
steps



Alert Reason: 3+ Absences

Determine where triage & action can be automated in Navigate

Intervention Pathway

- Automated email to student letting them know faculty noticed they were not in class
- Email to include links to additional resources (advising center, tutoring center, how to schedule an appointment in Navigate)
- Email to include reminder of attendance policy

- No formal intervention required

Alert Triggers Email?

- No email
- Email Assigned Staff
- Email Student

Alert Creates a Case?

- No Case
- Case to assigned staff member
- Case to Particular Individual

Note: At Risk Emails vs. Alert Reason Emails

At Risk Emails

- Send one email to each student per 'at risk' Progress Report issued
- Options to customize the subject line, general body text.
- Option to include the Alert Reasons in the email or not
- Emails come from the person who completed the Progress Report

Where to configure:

- Global & Group Configurations
- Work with your SL if you would like to use this option

Alert Reason Emails

- Send one email per Alert (if Alert is configured to send emails)
- Option to customize the general body text per each alert reason.
- Option to include the Alert Reasons in the email or not, per alert
- Emails come from a no-reply address and specify who filed the alert

Where to configure:

- Alert Reason Configurations
- Fully configurable by App Admin!

Alert Reason: Referral to Tutoring

Determine where triage & action can be automated in Navigate

Intervention Pathway

- Automated email to student
- Include tutoring website link and instructions to set up a Tutoring appointment within Navigate

- Automated case creation - auto-assign case to Tutor Coordinator (Elena Eckington, EckingtonE@woodley.edu)
- Elena Eckington to send an appointment campaign encouraging students to schedule appointment
- Once appointment is scheduled, case is closed

Alert Triggers Email?

- No email
- Email Assigned Staff
- Email Student

Alert Creates a Case?

- No Case
- Case to assigned staff member
- Case to Particular Individual

Alert Reason: Concern About Remote Education

Determine where triage & action can be automated in Navigate

Intervention Pathway

- Automated email to student letting them know of laptop loan and accessible Wi-Fi resources

- Automated case creation – auto-assign case to student's advisor
- Advisor expected to call each student by the end of each week and discuss personalized resource options
- Advisor to document outreach, next steps, outcome. Then close case

Alert Triggers Email?

- No email
- Email Assigned Staff
- Email Student

Alert Creates a Case?

- No Case
- Case to assigned staff member
- Case to Particular Individual

Alert Reason: Recognizing Good Work

Determine where triage & action can be automated in Navigate

Intervention Pathway

- Automated email to student letting them know their professor noticed their good work in class and encouraging them to keep it up!
- Automated email to student's assigned staff members (Advisors, Coaches) so staff is aware and can congratulate student

- No case or formal intervention required

Alert Triggers Email?

- No email
- ✓ Email Assigned Staff
- ✓ Email Student

Alert Creates a Case?

- ✓ No Case
- Case to assigned staff member
- Case to Particular Individual

Alert Reason: Non-Academic Concern

Determine where triage & action can be automated in Navigate

Intervention Pathway

- No automated emails

- Automated case creation – auto-assign to Dean Of Students
- Dean of Students to reach out to each student and work on a one-by-one basis
- Dean of Students to document outreach, next steps, outcome. Then close case
- No Navigate users besides the Dean of Students should have access to case notes

Alert Triggers Email?

- ✓ No email
- Email Assigned Staff
- Email Student

Alert Creates a Case?

- No Case
- Case to assigned staff member
- ✓ Case to Particular Individual



Configure in Site



3



Important Role Permissions



4

Important Alert & Case Permission



Care Unit Permissions & Data Access - For managers of cases associated with Care Units

Non-Care Unit Permissions & Data Access – For managers of cases not associated with Care Units

- Issue an Alert
- Allow User to Edit, Update and Close Cases
- Allow User to Assign Cases to Other Users
- View Cases for Other Users
- Delete Any Alerts (on report) - *keep to app admins only*

Student Profiles

- View Alerts on the Student Profile

Standard Reports

- View Alerts Report
- View Cases Report

Campaigns

- Create Progress Report Campaign
- View Progress Reports on Students
- Create Ad-Hoc Progress Reports



End User Experience

What do emails that come from Navigate look like?



5

New Resource...Navigate Email Map!

Will be reviewed at next week's Q&A

- Who does the email come from?
- Does the email show in Navigate in Conversations?
- Is the email customizable?
- Where can I configure?

Navigate Tip! Test emails in your Training Site

Global Configurations > Communication Settings

Communication Settings

E-mail Footer Message ?

B *I* Paragraph ⌵

You can put in footer text here.

Undeliverable Text Message Recipient ?

Email delivery method
deliver = send to real email address, reroute = send all emails to test address (next field), disable = never send any emails

reroute ⌵

Testing E-mail Address
In demo mode, all generated e-mails will be sent to this address.

fcavise@eab.com

Key Reminders:

- 1. Never set 'Email Delivery Method' to 'Deliver' (always reroute)**
- 2. Never change this in your Production Site (only Training)**

What do faculty see?




When they receive a Progress Report email:

Please submit feedback



Support 17 <fcavise@eab.com>
To Cavise, Fiona

 If there are problems with how this message is displayed, [click here to view it in a web browser.](#)

Student Feedback Request

Dear Professor Sogegian,
Hello,

We are now 4 weeks into the term! Please submit feedback on students in your class.

Thank you in advance for your help!

-Dean C

[Click to Begin Entering Student Feedback](#)

What do faculty see?

When they open Progress Report Campaign

Professor Sogegian:

A progress report has been requested for students in the following classes. This is intended to help us connect student needs with the appropriate support and services needed in order to succeed in your class and at our institution this term. Please provide feedback for each student based on your assessment of their performance in your class at this point in the term and indicating any other type of concerns or support the student may need.

300-Section 1 Hydrology

Student Name	Would you like to submit feedback about this student?	Reasons (You must choose at least one if you answered Yes)	Number of Absences	Current Grade	Additional Comments
1 Aadland, Carrie	<input checked="" type="radio"/> Yes <input type="radio"/> No	Alert Reasons	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Aadland, Derrick	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 Abbott, Donna	<input checked="" type="radio"/> Yes <input type="radio"/> No	Academic - Attendance or Participation Concern	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Abel, Jeffrey	<input checked="" type="radio"/> Yes <input type="radio"/> No	Academic - Low Grades or Performance Concern	<input type="text"/>	<input type="text"/>	<input type="text"/>
5 Adams, Frank	<input type="radio"/> Yes <input type="radio"/> No	Access to Necessary Resources (e.g. Laptop, Books)	<input type="text"/>	<input type="text"/>	<input type="text"/>
6 Adams, Michele	<input type="radio"/> Yes <input type="radio"/> No	At Risk of Transferring or Withdrawing	<input type="text"/>	<input type="text"/>	<input type="text"/>
7 Addis, Jerry	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="text"/>	<input type="text"/>	<input type="text"/>

What do automated Alert emails look like?



Student Email

Hi David Johnson

You have a new notification issued by William Sogegian

Attendance Concerns

Your professor would like to see you attend class more frequently. Please reach out to your professor or your advisor to talk about any challenges you're facing (internet access issues, work schedules, etc.).

This notification was issued on 02/09/2021 11:16am ET

Assigned Staff Email

A user has submitted an alert on one of your students.

Details are included below.

Name of Student

David Johnson

Categories

Swimming

Majors

English

What do automated Case emails look like?




[Case Assigned] Access to Necessary Resources (e.g. Laptop, Books) for Marnie Aldridge



William Sogegian <wrs2@eab.com>

To: Cavise, Fiona

 If there are problems with how this message is displayed, click here to view it in a web browser.

A Case has been Assigned to You

Student

Marnie Aldridge

Alert Reasons

Access to Necessary Resources (e.g. Laptop, Books)

Alert Issued By

William Sogegian

[View Case Details](#)

Can faculty keep track of their submitted alerts?

From the Professor Home:

My Issued Alerts

ISSUE DATE	STUDENT	ALERT REASONS	CASES	PROGRESS REPORT
02/09/2021	Johnson, David	Attendance Concerns	1 Open Case	No Progress Report
01/29/2021	Ancy, Salome	Attendance Concerns	0 Open Cases	No Progress Report
01/29/2021	Ancy, Salome	Academic Integrity	0 Open Cases	No Progress Report
01/08/2021	Johnson, David	Inadequate Access to Technology	0 Open Cases	No Progress Report
12/21/2020	Johnson, David	Inadequate Access to Technology	0 Open Cases	No Progress Report
10/27/2020	Abedi, Jorge	Behavioral Concerns	0 Open Cases	No Progress Report
09/22/2020	Abolt, Dove	Attendance Concerns, ...	1 Open Case	View Progress Report

Showing Items 1-10 of 45

— previous 1 2 3 4 5 next —



CASE INFO

Alert For Ancy, Salome
Issued on 01/29/2021 @ 7:43am ET

The following cases were opened as a result of this alert.

Alert Reasons	Status	Case Outcome
Attendance Concerns	Closed on 02/05/2021	Student contacted 3x, no response

Three Final Tips & Tricks



- 1 Create summary documentation of your Intervention Pathways for your faculty and staff
- 2 Consider additional Relationship Types for ease of alert triage
- 3 Never Delete Alert Reasons
While you *can* in the site, this may delete associated student data

Next: Register for next week's Q&A

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Configuration Intensive General Workshop Session

Now 😊

Configuration Intensive Follow Up Q&A

Tuesday, February 16th: 2-3pm EST

Post questions in comments section of this article:



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