EAB

Guide to Alerts, Cases, and Progress Reports

A Resource for SSC Members Engaged in Stage Four of Expanding Their Coordinated Care Network

Expanding the Coordinated Care Network

What Is the Coordinated Care Network?

A network of coordinated support providers, connected by technology and processes, to make it easier for students to navigate the system and receive holistic support.

People
- Advisors, administrators, faculty, career services, financial aid, counseling, tutoring services, residence life

Process
- Note taking and sharing standards
- Referral and transition policies
- Coordinated support and communication

Technology
- Tracked communications
- Shared documentation of interactions
- Case management
- Progress reports and alerts

When to Expand Your Coordinated Care Network

We recommend new members of the Collaborative begin rolling out EAB Navigate by engaging critical platform users such as advisors and instructional faculty before engaging additional support units. Implementing and promoting a new technology is a resource-intensive process, and we believe that staggering the roll-out of EAB Navigate to different user groups results in a smoother, more sustainable implementation experience. Once advisors and faculty are up and running in the platform, using features like advanced search, campaign management, and progress reports, institutions can begin to engage additional stakeholders and student support units in EAB Navigate.

By expanding the number of support units using the Navigate platform, members of the Collaborative will create a comprehensive network of student support units, unified through a single technology enabling them to track communication, and share critical information and records of their interactions with students.

Below are the four stages to expanding your Coordinated Care Network:
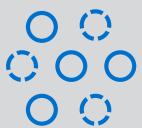
1. Engage Units in a Unified Vision of Student Care

- Lay the foundation for collaboration among student support units by introducing a campus-wide vision for improving student success that engages all support units.
- Help units define their role and contribution to this initiative and communicate role technology will play in realizing this vision.

2. Onboard New Units onto the Navigate Platform

- Collaborate with support units to identify the right role for EAB Navigate within their existing technology ecosystem.
- Develop a sustainable, scalable approach to user training and onboarding to support additional platform users.

3. Build Collaborative Practices

- Facilitate inter-unit collaboration using EAB Navigate's Case Management system. Develop processes and protocols that facilitate information sharing, process oversight, and data insights.
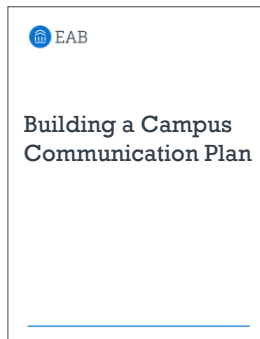
4. Optimize Care Coordination

- Improve existing processes for care coordination with wraparound trainings and cross-departmental committees designed to implement rapid change.

Resources for Expanding Your Coordinated Care Network

We have developed several resources to support institutions engaged in expanding their Coordinated Care Network:

1. Building a Campus Communication Plan

Successfully introducing a new piece of technology to your institution is critical to successful adoption and utilization. This toolkit includes resources designed to help members introduce stakeholders to EAB Navigate and engage them in a shared vision of student success, and is designed for members in the first stage of expanding their Coordinated Care Network.

2. Defining the Role of EAB Navigate in an Existing Technology Ecosystem

Most student support units already use one or more technologies to support their daily work. Members of the Student Success Collaborative can use this resource to identify technology solutions already in place, catalogue the different activities and workflows supported by incumbent technologies, and determine the right role for EAB Navigate within a support unit's existing technology ecosystem. This tool is most helpful to members engaged in stage two of expanding their Coordinate Care Network.
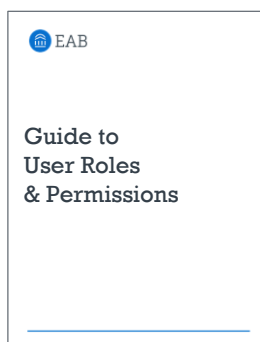
3. Guide to User Roles and Permissions in EAB Navigate

Providing new users with the correct roles and permissions is critical to enabling effective and responsible use of the Navigate platform. Members of the Collaborative can use this resource as a template for developing uniform permissions for various platform users. We recommend using this resource after determining how a support unit will use EAB Navigate.
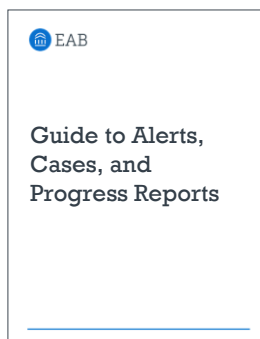
4. Guide to Alerts, Cases, and Progress Reports

EAB Navigate includes three features intentionally designed to support early alerts: progress repots, alerts, and cases. Each of these features can be used by faculty, advisors, and student support units to share critical information and track subsequent follow up, facilitating 'closed loop' communication.

Designed for members engaged in the third stage of expanding their Coordinated Care Network, this resource offers a brief introduction to each of these features. It defines the each intervention, outlines how they can work together, and offers examples of how to configure these features to support student interventions.

Coordinating with Support Units

Use EAB Navigate's Risk Signals to Gather and Share Feedback on Student Performance and Take Action on Potential Barriers to Student Success

EAB Navigate includes three features intentionally designed to support early alerts: progress reports, alerts, and cases. These features are used by faculty, advisors, and student support units to share critical information and track subsequent follow up, allowing for "closed loop" communication.

This guide offers a brief introduction to progress reports, alerts, and cases to help you define the role of each feature, how they can work together, and how to configure them to support and track student interventions.

We recommend reviewing this document with your consultant and referring back to it as you develop and implement these features at your intuition.

EAB Navigate Features that Support Early Alerts

Progress Reports

Enable advisors to proactively request feedback from faculty to understand individual student performance in each course.

- Advisors can collect information on:
  - A student's likelihood of failing a class
  - Their current or anticipated grade
  - Current absences
  - The need for a potential Alert
- From Progress Reports, an advisor can:
  - Intervene with students early and understand the reasons for risk
  - If necessary, create an Alert for thorough follow-up from another office
  - Guide students to relevant resources

Alerts

Advisors, faculty, and student support staff with the appropriate permissions can create an alert to draw attention to a student who may potentially be at-risk.

Cases

Members can configure specific alerts to automatically open a cases with a specific office or staff member. Once a case is opened, the sender and recipient can add information to the case, view progress, and close the case.

Three Ways to Maximize the Impact of Early Alerts—In 30 Minutes

In this short on-demand webconference, EAB experts explored three proven early alert practices, with a focus on how the SSC technology can support these practices. Click here to view.

Process Overview

Defining Workflows for Progress Reports, Alerts, and Cases*
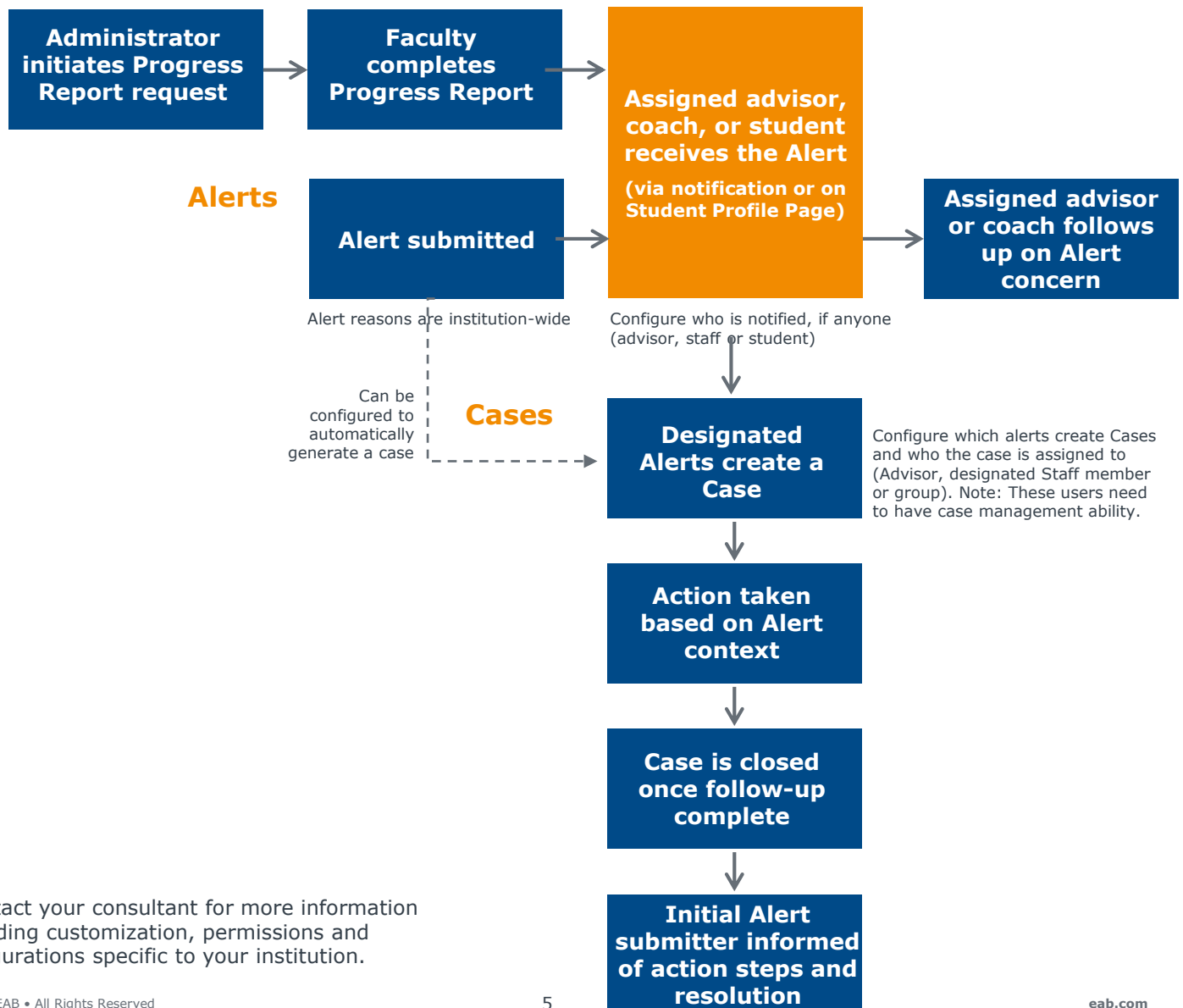

Progress Reports

Course-based request of instructors by an Administrator regarding a specific set of concern factors related to individual student academic and/or behavioral performance at key times during the term

Alerts

Ad hoc individual student alert opened by a faculty member, staff, or other user based on information or behavior surfaced during:
- Student interactions (office hours, advising meetings, tutoring sessions)
- Received information (Progress Report or Notes from other faculty or staff)
- Observation (attendance records or tutoring Reports)

Progress Reports

| Administrator initiates Progress Report request | → | Faculty completes Progress Report | → | **Assigned advisor, coach, or student receives the Alert** (via notification or on Student Profile Page) |

Alerts

| Alert submitted | → | (Assigned advisor, coach, or student receives the Alert) | → | Assigned advisor or coach follows up on Alert concern |

Alert reasons are institution-wide

Configure who is notified, if anyone (advisor, staff or student)

Can be configured to automatically generate a case

Cases

Designated Alerts create a Case

Configure which alerts create Cases and who the case is assigned to (Advisor, designated Staff member or group). Note: These users need to have case management ability.

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Action taken based on Alert context

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Case is closed once follow-up complete

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Initial Alert submitter informed of action steps and resolution

*Contact your consultant for more information regarding customization, permissions and configurations specific to your institution.

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Determining Case Management and Workflows

Example Mapping Exercise

Before launching case management at your institution, we recommend identifying the types of offices and interventions you would like to track using EAB Navigate's case functionality, intervention processes, and desired outcomes. Below is an example of one approach for this type of process mapping.

Case Reason	Example of Intervention	Triage Process	Recommended Action	Desired Outcome	Successful Case Close Reason:
Financial Issues	Student expressed concern at being able to pay for school; student mentions a change in their financial situation	Staff refers student to financial aid office	Financial aid offices meets with student to assess change in students financial situation and identify eligible interventions	Student receives additional support	Support Administered
Social Concerns / Engagement	Student does not appear to have a community on campus; student does not participate in extracurricular activities (this can be a particular problem for high performing students who may then transfer to another institution)	Staff refers student to residence affairs office	Staff in student life or student's advisor meet with student to discuss student's transition to campus and direct student to campus communities with similar interests	Student is counseled about relevant support resources	Met with student & shared resources
Mental and Physical Health	Observations or student interactions lead a staff member to have concerns about stress and wellbeing, or the student appears to be sick for long periods of time, etc.	Health Services will typically receive these cases and then take care of the concern outside of the platform to remain HIPPA compliant	Health Services receive referral via Navigate and follow up using existing protocols	Health Services alerted of concerns about student	Received Referral
Career Counseling	Student approached faculty member or advisor seeking help reviewing a cover letter for a job or internship application	Staff refers student to career services office	Career services contact students to meet with them or share relevant materials	Student receives guidance for crafting a cover letter	Support Administered