Alerts & Cases Worksheet

Instructions:

This worksheet is designed to help you audit the Alerts & Case processes you have outlined for your institution. Outlining these processes will enable you to more easily configure in Navigate. Complete the below table to the best of your ability.

Page 3 includes an example of a completed exercise as a reference point if helpful.

Part 1: Alert Reason and Intervention Pathway Mapping

Alert Reason	Triage Who is notified of the alert and how?	Intervention & Additional Notes Describe the expected intervention
Alert Reason #1: **Include in Student Hand Raise: Y/N** Associated with Care Unit: Y/N	Alert triggers email? ❑ No email ❑ Email Assigned Staff ❑ Email Student Alert Creates a Case? ❑ No Case ❑ Case to assigned staff member ❑ Case to a Particular individual	
Alert Reason #2: Include in Student Hand Raise: Y/N Associated with Care Unit: Y/N	Alert triggers email? ❑ No email ❑ Email Assigned Staff ❑ Email Student Alert Creates a Case? ❑ No Case ❑ Case to assigned staff member ❑ Case to a Particular individual	
Alert Reason #3: Include in Student Hand Raise: Y/N Associated with Care Unit: Y/N	Alert triggers email? ❑ No email ❑ Email Assigned Staff ❑ Email Student Alert Creates a Case? ❑ No Case ❑ Case to assigned staff member ❑ Case to a Particular individual	
Alert Reason #4: Include in Student Hand Raise: Y/N Associated with Care Unit: Y/N	Alert triggers email? ❑ No email ❑ Email Assigned Staff ❑ Email Student Alert Creates a Case? ❑ No Case ❑ Case to assigned staff member ❑ Case to a Particular individual	
Alert Reason #5: Include in Student Hand Raise: Y/N Associated with Care Unit: Y/N	Alert triggers email? ❑ No email ❑ Email Assigned Staff ❑ Email Student Alert Creates a Case? ❑ No Case ❑ Case to assigned staff member ❑ Case to a Particular individual	

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Part 2: Configurations Audit

1. **Case Communication Settings**

    Audit the following settings for non-Care Unit Cases (Global Configurations) AND Care Unit associated Cases (Care Unit Configurations):
    - ❑ *When a case is assigned, send an email to the user to which it was assigned*
    - ❑ *When a user is marked as the owner of a case, email the owner with the case details*
    - ❑ *Send an e-mail to the alert issuer when a case is closed*

    <mark>Next Step:</mark> **Update Configurations as needed**

2. **Is the Alert Types (Positive Alerts) Module 'On' in your site? (circle one)**

    Yes   No

    To check, click on an Alert Reason. If Alert Types is on, you will see a menu titled 'Alert Type' in the General Settings box. This menu will not exist if Alert Types is off.

    <mark>Next Step:</mark> **To turn Alert Types on, submit a ticket to NavigateTechSupport@eab.com**

3. **What Relationship Types do you have in Navigate? (list below)**
    - •
    - •
    - •

    Student/staff relationships must be assigned/maintained in your SIS to use in Navigate.

    <mark>Next Step</mark>: **To include additional Relationships Types, submit a ticket to NavigateTechSupport@eab.com.**

4. **Role Audit: Which Roles have permissions to which Alert/Case workflows in Navigate?**

    Use the 'Export Role Permissions' button in 'Role Configuration & Access' in Navigate to see all permissions assigned to all roles. Filter to the following Alert/Case permissions:
    - ❑ Create Alerts
    - ❑ View Alerts
    - ❑ Delete Alerts
    - ❑ Allow user to edit, update and close cases
    - ❑ Allow user to assign cases to other users
    - ❑ View cases for other users

    Be sure to audit both the non-care unit alert/case permissions in the 'Role Permissions' tab of the excel file AND the care unit alert/case permissions in the 'Care Unit Role Permissions' tab of the excel file.

    <mark>Next Step:</mark> **Update Configurations as needed**

Alerts & Cases Worksheet: EXAMPLE

Example:
• This is an example of a completed worksheet from our sample school, Woodley University.

High Level Early Alert Management Audit

Alert Reason	Triage Who is notified of the alert and how?	Intervention Describe the expected intervention
Alert Reason #1: **3+ Absences** Include in Student Hand Raise: Y/**N** Associated with Care Unit: Y/**N**	Alert triggers email? ☐ No email ☐ Email Assigned Staff ✓ Email Student Alert Creates a Case? ✓ No Case ☐ Case to assigned staff member ☐ Case to a Particular individual	• No case or formal intervention required • 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
Alert Reason #2: **Referral to Tutoring** Include in Student Hand Raise: Y/**N** Associated with Care Unit: Y/**N**	Alert triggers email? ☐ No email ☐ Email Assigned Staff ✓ Email Student Alert Creates a Case? ☐ No Case ☐ Case to assigned staff member ✓ Case to a Particular individual	• Alert submitted by faculty about students in their class • Automated email to student with tutoring website link • Automated case creation - auto-assign case to Tutor Coordinator • Tutor coordinator to send an appointment campaign encouraging students to schedule appointment. Once appointment is scheduled, case is closed
Alert Reason #3: **I need help in a class** Include in Student Hand Raise: **Y**/N Associated with Care Unit: Y/**N**	Alert triggers email? ☐ No email ☐ Email Assigned Staff ✓ Email Student Alert Creates a Case? ☐ No Case ☐ Case to assigned staff member ✓ Case to a Particular individual	• Alert submitted by student asking for help • Automated email to student acknowledging receipt of request. Email to include self-service tutoring resources. • Automated case creation – auto-assign case to tutor coordinator • Tutor coordinated expected to reach out to the student at the end of each week and match student with a tutor. Once student has tutor appointment scheduled, case is closed
Alert Reason #4: **Recognizing Good Work** Include in Student Hand Raise: Y/**N** Associated with Care Unit: Y/**N**	Alert triggers email? ☐ No email ✓ Email Assigned Staff ✓ Email Student Alert Creates a Case? ☐ No Case ☐ Case to assigned staff member ☐ Case to a Particular individual	• No case or formal intervention required • 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
Alert Reason #5: **Non-Academic Concern** Include in Student Hand Raise: Y/**N** Associated with Care Unit: **Y**/N	Alert triggers email? ✓ No email ☐ Email Assigned Staff ☐ Email Student Alert Creates a Case? ☐ No Case ☐ Case to assigned staff member ✓ Case to a Particular individual	• 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

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