



EAB

# Getting the Most out of Navigate Early Alerts

University of Wisconsin System Community of Practice  
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Student Success Collaborative

- 1 Welcome & Agenda Review
- 2 Early Alert Structure Review
- 3 Intervention Pathways Concept Refresher
- 4 Break-out Group Time
- 5 Debrief & Wrap-Up

# Recalling the Coordinated Care Network



## 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 processes

## Technology

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

# Navigate in Practice

## Defining Early Alerts and Revisiting Available Features

**Early-Alert System:** *An early-alert system may be defined as "a formal, proactive, feedback system through which students and student-support agents are alerted to early manifestations of poor academic performance (e.g., low in-progress grades) or academic disengagement (high rates of absenteeism)."*

### Navigate Features That Support Early Alerts



#### Progress Reports

Proactively request feedback from faculty on individual student performance in a course



#### Alerts

Advisors, faculty, and student support staff can create an alert to draw attention to a student who may potentially be at risk



#### Cases

Configure specific alerts to automatically open a case. Once a case has been opened, the sender and recipient can add information to the case, view progress, and close the case

# End-to-End Early-Alert Management



1

## Planning & Goal Setting

- Strategic goals
- Specific objectives
- Metrics & assessment plan
- Culture building & expectations



2

## Collection

- Early-alert reasons
- Faculty & staff participation
- Communication & collection timeline



3

## Triage

- Alerts & case protocols
- Triage process



4

## Intervention Pathway

- Determining intervention pathways
- Outreach & intervention plan
- Case management
- Closing the loop



5

## Assessment

- Process & outcomes assessment

# What Appropriate and Achievable Pairings Exist?

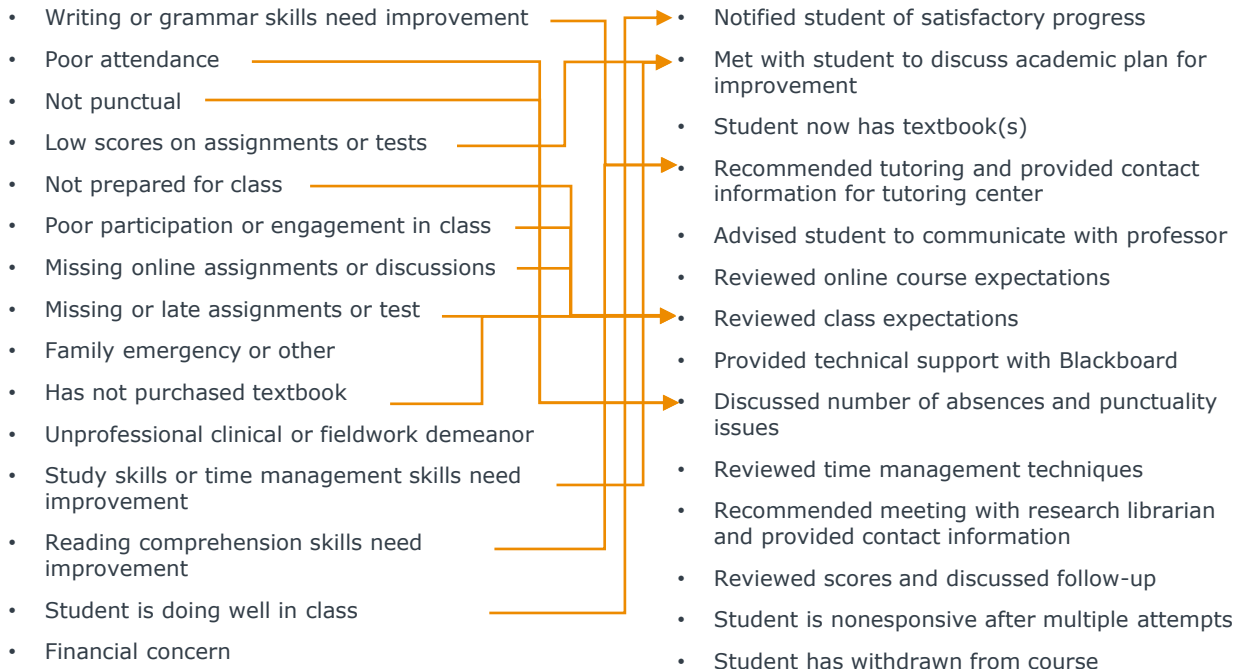


## Pathway Creation in Practice

### Early-Alert Reasons



### Early-Alert Interventions



# Establish Your Intervention Pathways



## Pathway Creation in Practice

### Final List of Early-Alert Reasons



### Determined Intervention Pathways

- |  |   |  |
|--|---|--|
| • Student is doing well in class                                   | → | • Notified student of making satisfactory progress in course |
| • Low scores on assignments or tests                               | → | • Met with student to discuss academic plan for improvement  |
| • Refer to tutoring: please provide specific details in comment    | → | • Recommended tutoring and provided contact information      |
| • Missing in-class assignments, online discussions, or tests       | → | • Reviewed class expectations with student                   |
| • Not prepared for class   | → | • Discussed number of absences or punctuality issues         |
| • Attendance or punctuality issues                                 | → | • Met with student to discuss nonacademic concern            |
| • Nonacademic concerns: please provide specific details in comment | → |  |



Limit scope of intervention to what is **consistently achievable**

# Determine Clear Plan and Timeline

Ask Staff to Follow Consistent Protocols to Ensure Impact

## Intervention Protocols

Tarleton University



Early-Alert Reason	Initial Response Time Frame	Case Assigned To	Discussion and Determined Intervention
In Danger of Failing	24 Hours	Director, Student Development and Mentoring	Discuss importance of making satisfactory progress in course; co-create academic plan for improvement; facilitate connection to appropriate campus resources; review class expectations; set up plan of action along with follow-up steps
Student May Drop Class	24 Hours	AVP, Strategic Student Success Initiatives	Discuss desire to drop course; explore pros and cons of dropping a course; consider/develop course recovery plan; determine impact on graduation timeline; set up plan of action
Expressed Financial Concerns/Hardships			
General - Please Explain			
Considering Alternative Major	72 Hours		
	48-72 Hours		Discuss financial concerns; explore financial support options as appropriate; set up plan of action along with follow-up steps
Student May Benefit from Tutoring/SI	24-48 Hours	Director, Tutoring and Learning Center	Discuss benefits of tutoring; schedule tutoring session



# Be Explicit About Outreach Expectations

Provide Staff with Specific Number and Type of Touch Points

## Student Outreach Timeline



## Key Aspects of Effective Student Outreach

### Multimodal

Staff should reach out to students via email, text, phone call, etc.

### Solutions-Oriented

Communications tone and messaging are not punitive, but rather, focused on resources

### Direct

Messages should include a clear CTA so that students immediately know what they need to do

# UWSA Resource Library Available

## Advising and Student Support

Toolkits, infographics, webinars, advising diagnostic tool, notes and reports guides

## Analytics

Videos, webinars, institution reports and other documents related to the prediction

## Communications

Communication examples for faculty communications calendar template, and

## Functionality

Materials related to Alerts, Progress Campaigns; Quick Polls; and Text and

## Other Tools and Resources

Product fix/enhancement process, product updates, leadership resources, best practices, case studies

## Professional Development

Remote advising practices, webinars PPTs and recordings, digital advising infographic

https://www.wisconsin.edu/ss-eab-project/uw-system-resources/functionality/

### Project Team Resources

- Project Team Resources
- Advising and Student Support
- Analytics
- Communications
- Functionality
- Other Tools and Resources
- Professional Development
- Project Start Up
- Student App
- Training
- Virtual Student Support

### EARLY ALERTS, PROGRESS REPORTS AND CASES

- Designing and Scaling Intervention Pathways PDF
- Designing and Scaling Intervention Pathways Worksheet PDF
- EAB PPT: Configuration Intensive - Alerts & Cases Workshop Presentation February 2021 PDF
- EAB Webinar: Pre-Work: Configuration Intensive - Alerts & Cases Workshop February 2021 PDF
- EAB PPT Engaging Faculty Through Effective Progress Report & Alert Workflow Design PDF
- EAB PPT Coordinating End to End Early Alerts PDF
- EAB Toolkit
- EAB Infogra
- EAB PPT Ea
- EAB Integra
- Northern Ill
- Pellissippi S
- Tennessee
- University of
- University of
- University of
- UW-Dashkoz
- UW-Plattevi
- UW-Plattevi
- UW-Superior Alert Pain Scale PDF
- UW-Whitewater: Case Management Workflow PDF
- UW-Whitewater: Issuing an Alert and Reviewing Alerts/Cases PDF

### CAMPAIGNS

- EAB March 2020 Workshop PPT Executing an Appointment Campaign Strategy PDF
- EAB Toolkit Designing and Implementing Targeted Advising Campaigns PDF
- EAB Toolkit Designing and Implementing Targeted Advising Campaigns

### QUICK POLLS



## Opportunity for Resource-sharing

Please share any of your own campus resources with your Strategic Leader or directly with Sandy at [sskallio@uwsa.edu](mailto:sskallio@uwsa.edu) to add to the UWSA library.

# Determine the Right Fit Strategy



Ensure Your Expectations Set Your Campus Up for Success



## When Perfect Is the Enemy of Good

Requiring comprehensive notes for all cases can be time-intensive and cause a decrease in case-closed rates. If cases are not consistently closed, you cannot effectively assess the impact of your early-alert interventions.

## Establish Baseline Expectations That Are Consistently Achievable



### Good/Required

- **Case closed** in a timely manner with appropriate case outcome reason



### Better

- **Basic description** provided of the outreach or intervention conducted
- **Case closed** in a timely manner with appropriate case outcome reason

# A+

### Best

- **Detailed notation** of all outreach, interventions, and student responses by each person involved with case
- **Case closed** in a timely manner with appropriate case outcome reason

# Polling to Kick-off our Break-out Time



**Does your campus use Navigate cases?**

**Does your campus use alerts not associated with progress reports (i.e., ad-hoc alerts)?**

**Does your campus use alerts/cases to refer students across care units/ student support services?**

**What units participate in the alerts/cases workflow on your campus?**



# Break-out Group Time

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## Early Alert Structure

How are you currently using Early Alerts in Navigate?

Does your process utilize Progress Reports, Ad-hoc Alerts, or Cases? All of them?



## Intervention Pathways

What expectations does your campus have for staff when alerts are issued, or a case is opened?

How did/does your campus communicate these expectations to faculty and staff?

How do you assess compliance/effectiveness of these pathways?



# Debrief & Wrap-Up

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# Leadership Team Take-Away Resource

## Intervention Pathways Diagnostic

Strategy Diagnostic: Concept

### Integrating Early Alerts and Case Management

	Not Yet	Somewhat	Definitely	
COLLECTION	Are faculty/staff receiving from a reasonable list of Alert Sources when they issue Alerts or submit Progress Reports, i.e. does the list capture common concerns without being overwhelming?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Were faculty/staff involved in the development of Alert Sources and Progress Report strategy in order to ensure buy-in and set appropriate expectations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do Progress Report campaigns focus on specific courses or student populations in alignment with institutional and departmental student success goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a centralized process and timeline for creating, sending, and reviewing Progress Report campaigns?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRIAGE	Do you meet with faculty/staff at least twice a year to share updates, provide support, and collect overall feedback?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established tiered triage processes to help quickly review/assign cases based on specialty or capacity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do you reduce triage and simplify intervention pathways where possible by creating and leveraging self-service opportunities (e.g. direct-to-student communication, resource-focused courses, appointment campaigns)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do you leverage Care Unit-Specific Case assignment in instances where case data should be directed and limited only to specific stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INTERVENTION PATHWAYS	Are collaborative, cross-functional teams assigned to help handle severe/complex cases?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Were faculty/staff involved in the design of Intervention Pathways to help identify and formalize successful cross-functional intervention practices?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified and resolved large-scale support infrastructure gaps, such as specific case types often going unresolved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Is there a specific person/team/department responsible for owning the overall process and ensuring that existing and future challenges are met?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEXT STEPS	Have you provided faculty and staff with training, expectations, and documentation of intervention pathways and protocols?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do protocols include clear timelines, owners, and action steps?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**REVIEW YOUR RESPONSES ABOVE.** Brainstorm Action Items that address areas where you responded "Not Yet" or "Somewhat".

When outlining your Action Items, think about the who, what, where, when, and why components of each plan. For example, who will own the Action Item and who will support these efforts? What is your timeline? How will you accomplish these next steps and set up your teams for success?

1 | Action Item:

2 | Action Item:

## Discussion Points

- What area within the diagnostic was ranked "Not Yet" or "Somewhat"?
  - Why did you rank it there?
  - What needs to be done to make improvements in this area?
  - Who needs to be involved in this process?
- What does the triage process look like on campus? How are you managing staff/faculty capacity throughout the early alert process and time frame?
- Is there a culture of shared responsibility around student support and intervention on campus?



# Leadership Team Take-Away Resource

## Intervention Pathways Example



TEXAS SOUTHERN UNIVERSITY

**T-CLAW**  **NAVIGATE**  
Student Success Platform

### T-Claw Navigate Alerts Raised by Faculty

Alerts are raised by the Faculty members to communicate a concern to the student about their academic performance in class. Alerts and their descriptions are explained below:

ALERT	INTERVENTION WORKFLOW	TRIAGE PROCESS
<b>Attendance Concern</b> (INSTRUCTOR) Raise this alert when a student is not regularly attending class. Please provide specific comments.	Academic Advisor meets with student and provides tailored advising support to address absences. <ul style="list-style-type: none"><li>Email message sent to student with information and next steps to address the issue</li><li>Viewable on Student Profile</li></ul>	<ol style="list-style-type: none"><li>Faculty member reviews course expectations for attendance</li><li>Academic Advisor discusses the importance of attendance to be successful</li><li>Academic Advisor discusses with the student why they have been marked At-Risk to failing course and discuss time management and study habits</li><li>Academic Advisor places students on a watchlist after an appointment and set up follow up reminders.</li></ol>
<b>Class Participation Concern</b> (INSTRUCTOR) Raise this alert when a student's participation in a course is below the class average. Please provide specific comments.	Connect with Advisee to seek out academic support services such as tutoring and academic skills center workshops. <ul style="list-style-type: none"><li>Email message sent to student with information and next steps to address the issue</li><li>Viewable on Student Profile</li></ul>	<ol style="list-style-type: none"><li>Faculty member meets with student and adds note of interaction</li><li>Academic Advisor to diagnose what issues the student is experiencing.</li><li>Academic Advisor connects student with the Tutoring Support Center and Academic Skills Center</li><li>Encourage student to make appointment and how they plan to work toward improving performance</li></ol>
<b>Failed Midterm Exam</b> (INSTRUCTOR) Raise this alert when a student fails the midterm exam. Please provide specific comments.	Connect with Advisee to seek out academic support services such as tutoring and academic skills center workshops. <ul style="list-style-type: none"><li>Email message sent to student with information and next steps to address the issue</li><li>Viewable on Student Profile</li></ul>	<ol style="list-style-type: none"><li>Academic Advisor to diagnose what issues the student is experiencing.</li><li>Academic Advisor connects student with the Tutoring Support Center and Academic Skills Center</li><li>Encourage student to make appointment and how they plan to work toward improving performance</li></ol>



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