Integrating Early Alerts and Case Management

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

NEXT STEPS

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:**