Issuing an Alert and Reviewing Alerts/Cases

All documentation recorded in Navigate is part of a student's academic record. Navigate is intended to capture academic-related information. When documenting in Navigate, whether in a Note, an Appointment Summary Report, an Alert, or other communications, keep FERPA in mind and consider the following guidelines.

- Assume students and others could read anything you have written.
- Avoid personal, potentially sensitive content.
- Describe, rather than evaluate. When in doubt, leave it out.
- Ask yourself the following questions:
    - Is this something the student would want other people to know?
    - Is this something another advisor/office would need to know? Why?
    - Is this something that is within my scope of practice to say?

Concerns regarding illness, injury, death of family member or friend, mental health, safety or insecurity, and other non-academic issues should be directed to CARE Team in the Dean of Students Office (https://www.uww.edu/dean-of-students/). *Do not include sensitive, personal, or subjective information in Navigate.*

If you have questions, please contact: navigate@uww.edu

Alerts are a way to draw attention to a student who might be at risk for a variety of reasons and trigger an intervention. You can submit an alert at any time through the platform. Some alerts will send an email to the student containing recommended steps and resources to resolve the issue, while other alerts will open "cases."

A case is a referral sent directly to a staff member. This opens an electronic file where the steps taken to resolve the concern can be documented. You can quickly search to see which of your students has an alert or case depending on your role and permission levels.

<u>*Instructors*</u> We encourage you to use this as a "year-round" progress report. You can report a concern on any student at any time. Prior to submitting an alert, we encourage you to reach out to the student directly at least once. If you receive no response or feel additional assistance is necessary, proceed with submitting the alert.

Note that what you include in the comments area of an alert will be viewed by other staff members so they can better serve/support our students through targeted interventions. Alerts submitted through Progress Reports are viewable to students. Alerts not submitted through Progress Reports are a part of a student's academic record and can be requested by the student. Please be mindful of the language you are using.

How to Submit an Alert

Select the Student & Begin the Alert

Log into Navigate using your campus credentials at uww.campus.eab.com. If you're looking for a student that is not on your course roster or an assigned advisee, click *'Issue an Alert'* under *Actions* on the right side of the home screen to begin the alert submission process. After clicking on *'Issue an Alert,'* search for the student by typing their name or ID number.
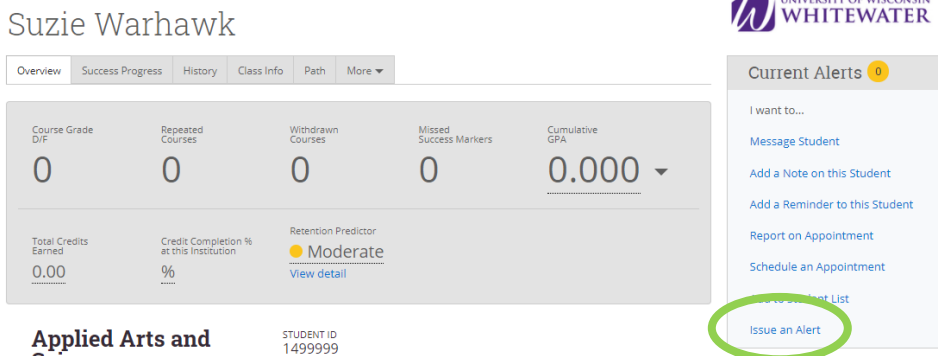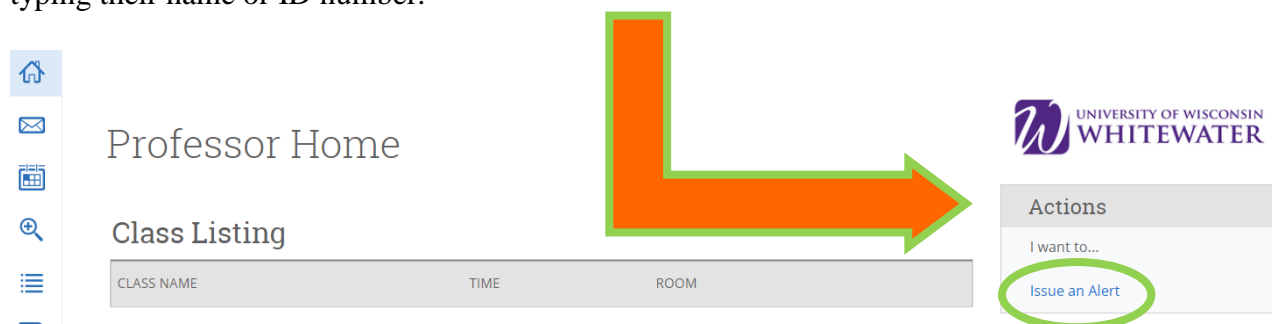

If you're looking to submit an alert for a student in your course or who is one of your assigned advisees, you can also find the student on your 'Staff Home' or 'Professor Home' screen. Select the box next to the student for whom you want to issue an alert. *It is recommended that you submit an alert for one student at a time. Selecting multiple students at a time from this list will submit alerts with identical alert reasons and comments for selected students.*
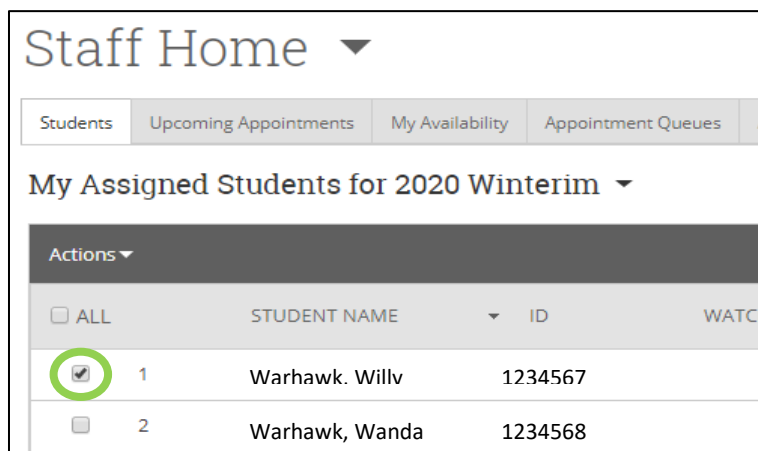
Use the 'Actions' dropdown at the top of the student list and select "Issue Alert".
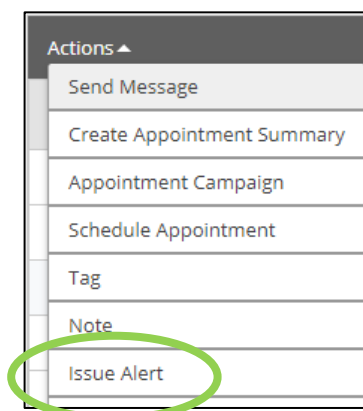
NOTE: You can also issue an alert from a student profile page (i.e., you used the 'Quick Search' feature to get to a student's profile). Once on the profile page, you can select the 'Issue an Alert' from the right hand side of your screen.
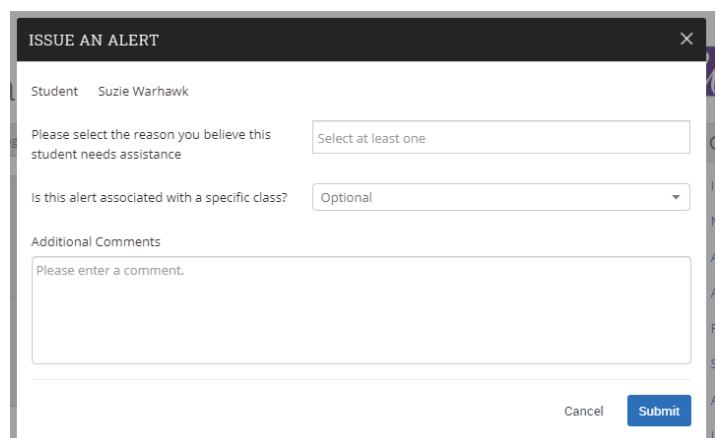

Filling Out the Alert

Once you click on *Issue an Alert,* the submission form will appear. Complete form by filling out the following:

- Reason you believe student needs assistance (you may select more than one reason)
- Is the alert associated with a certain class? (select if applicable)
- Any additional comments
  - ○ Provide relevant context to the situation so the outreach that best meets the student's needs can be delivered. Ideally this would include:
    - ▪ Specific details about your concern
    - ▪ A short description of what outreach attempts have already happened
    - ▪ Recommendations on how to resolve the issue or next steps to take
    - ▪ How you wish to be contacted by the student
  - ○ Example: *Suzie Warhawk has missed the last three classes and has not submitted assignments since the third week of the semester. I have reached out via email multiple times with no response. I encourage Suzie to meet with me to discuss the missing work. She can visit me during office hours or email me.*

NOTE: *Additional comments can be viewed by other faculty and staff members pending their role and permission level. Alerts submitted through Progress Reports are viewable to students. Alerts not submitted through Progress Reports are a part of a student's academic record and can be requested by the student. Please be mindful of the language you use when submitting alerts.*

Once completed, click 'Submit'.

Which Alert Reason Should I Choose?

Alert Types
Submitting an alert through Navigate can be for a positive, negative, or neutral reason. View alerts as a way to trigger additional support to students who need it, but also as another way to communicate action steps or acknowledge positive behaviors. Use the chart below to learn more about the various alert reasons, when to use that reason, and what happens if that reason is selected.

Selecting More Than One Reason
If more than one alert reason is selected, each reason will trigger its own response. See below for a list of alert reasons and associated actions that occur. More information about this can be found in the *What Happens After Submitting an Alert?* section below.

NOTE: Please do not select more than one alert reason that triggers a case. If you do, multiple cases are opened for the same student through a single alert. If this occurs, the duplicate cases will be closed with the reason of 'Duplicate alerts created; addressing through another alert.'

Negative or Neutral Alert & Progress Report Submission Action Plan

Reason or Concern	How to Submit this Alert	When to Use this Alert Reason	Outcome
At risk of D or F grade in course	Alert or Progress Report	Student is on pace to earn less than a C in the course due to their current performance.	Alert: A 'case' will be created, which will lead to individual student outreach by one of the student's campus connections (advisor, hall director, college representative, etc.) Progress Report: Student will receive an email stating the concern with campus resources and suggested action steps. The student's campus connections (advisor, DSC, coach, etc.) will review the concern and take appropriate next steps.
Attendance and/or participation concerns	Alert	Student is frequently missing class or showing up late (in-person courses), has not logged in to Canvas or opened modules, etc. (online course), and/or is not participating in the course (virtually through Canvas or in-person participation concerns).	A 'case' will be created, which will lead to individual student outreach by one of the student's campus connections (advisor, hall director, college representative, etc.)
Failure to attend or participate in course	Progress Report	Student is frequently missing class or showing up late (in-person courses), has not logged in to Canvas or opened modules, etc. (online course), and/or is not participating in the course (virtually through Canvas or in-person participation concerns).	The student will be able to view this concern through their Navigate app. The student's campus connections (advisor, DSC, coach, etc.) will review the concern and take appropriate next steps.
Financial concern	Alert	Student indicated they are struggling financially, would like more information about financial literacy, or needs to be connected to someone in Financial Services.	A 'case' will be created, which will lead to individual student outreach by someone in Financial Services.

Low scores on assignments or tests	Progress Report	Student turns in work and/or takes exams, but it is consistently poor quality.	The student will be able to view this concern through their Navigate app. The student's campus connections (advisor, DSC, coach, etc.) will review the concern and take appropriate next steps.
Missing/late assignments or falling behind in coursework	Progress Report	Student has missed multiple assignments, consistently turns in late or incomplete assignments, and/or is falling behind.	The Academic Advising & Exploration Center will review this alert and provide outreach as needed.
Pathway for Success Student Concern	Alert	Use if you KNOW a student is a part of the Pathway for Success Program. If you are unsure, do NOT use this reason. Concerns will be directed specifically to the Pathway Advisors for management.	A 'case' will be created, which will lead to individual student outreach by the Pathway for Success program advisors.
Student plans to drop a course or withdraw from the university	Alert or Progress Report	Student has made you aware that they plan to drop a class or withdraw from the term.	A 'case' will be created, which will lead to individual student outreach by one of the student's advisors.
Sudden decline in performance	Alert or Progress Report	There is a sudden, negative change in attendance or academic performance (i.e., a conscientious student starts to miss class, not turning in assignments, etc.). Do **NOT** select this *and Attendance and/or participation concern.* Doing so will result in multiple case files and outreach attempts.	A 'case' will be created, which will lead to individual student outreach by one of the student's campus connections (advisor, hall director, college representative, etc.)
Suggested tutoring or supplemental instruction	Alert or Progress Report	Student would benefit from additional academic content support.	Student will receive an email stating the concern with appropriate campus resources. An email will be sent to Tutoring who will provide outreach.
Time management, technology, or academic/study skill concern	Alert or Progress Report	Student may benefit from success coaching or outreach to address specific technology, academic, or study skills concern.	Student will receive an email stating the concern with appropriate campus resources. The Academic Advising & Exploration Center will review this alert and provide outreach as needed.
University Housing Concern	Alert	The student disclosed a concern related to University Housing (roommate concern, issue with their room/hall or floormates, etc.).	A 'case' will be created and automatically routed to the student's Complex Director.

Positive Alert & Progress Report Submission Action Plan

Reason or Concern	How to Submit this Alert	When to Use this Alert Reason	Outcome
Great contributor to class discussions	Progress Report	Student is actively engaged in class and positively contributes to discussions.	The student will be able to view this through their Navigate app. The student's campus connections (advisor, DSC, coach, etc.) will review.
Great effort displayed in class	Progress Report	Student shows they are trying to be successful in the course.	The student will be able to view this through their Navigate app. The student's campus connections (advisor, DSC, coach, etc.) will review.

Positive contributor to campus community	Progress Report	Student is doing something great and you want them to know it!	The student will be able to view this through their Navigate app. The student's campus connections (advisor, DSC, coach, etc.) will review.
Positive alert: Great contributor to campus community	Alert	Student is doing something great and you want them to know it!	The student will receive an automatic email stating your name and letting them know that you think they're doing a great job. This language is generic and we will encourage the student to reach out to you for more information.

What Happens After Submitting an Alert?

Once an alert is submitted there are two different intervention tracks that take place. The charts listed above outline if a "case" will be created.

Alerts that Do Not Open Cases
If the alert reasons do NOT open a case, there are two ways an alert will be handled:

1) Email to the student: An email may be automatically sent to the student addressing the reason selected. This email does NOT include the original comments made by the individual who is issuing an alert. The email generated will include lists of resources or action steps to take to resolve the concern. An example of a message sent to the student is shown on the right.

2) Staff review: Some alert reasons are reviewed through other intervention efforts by advisors and other staff members on campus. Through this review process, other interventions like a meeting, email/phone outreach, etc., may occur.

> Hi Suzie
>
> Your instructor, Jessica Stein reported that you may benefit from tutoring for one or more of your courses. Luckily, campus has free resources to help you with your classes!
>
> **Review tutoring options.** Campus Tutorial Services (main campus: tutorctr@uww.edu, 262-472-1230, located in the Success Center) and the Learning Support Center (Rock campus: triostwk@uww.edu, 608-758-6535, located in Andrews Hall) can discuss tutoring options available.
>
> **Try *Study Buddies*** on the new Navigate Student app (desktop version also available). Here you can find other students in your classes that are looking to form study groups. Check out the Navigate website for more information on how to download or use the app.
>
> We encourage you to explore tutoring options as soon as possible. If you have questions or concerns, please contact your academic advisor.

Alerts that Open a Case
If an alert is set to open a case, a professional staff member is notified and will reach out to the student to discuss the concerns within a week's time:

1. Call student the day the case is received; if they connect with student, it is reported on the case and the case is closed. If the student did not answer, a voicemail is left. If the voicemail is full or not set up, the student is emailed.

2. If no contact from the student is made within two days, the student is called again. If they connect with student, it is reported on the case and the case is closed. If the student did not answer, a voicemail is left AND an email is sent.

3. If no contact has been made within four days, additional units on campus may be contacted for assistance in reaching the student. These units include University Housing, First Year Experience (Peer Mentors), other instructors, or other areas that may potentially have a relationship with the student. If no unit can be identified, one additional outreach attempt may be made. If the student is reached, the case is closed with the appropriate reason. If no contact is made with student after the three attempts within the week, the case is closed with the 'Attempted to contact 3x, unable to reach the student' outcome reason.

Selecting More Than One Reason

If more than one alert reason is selected, each reason will trigger its own response. If an individual selects 'Suggested tutoring or supplemental instruction,' 'At risk of D or F in course,' and 'Attendance and/or participation concerns,' the following actions will occur:

*   Email sent to student with resources on how to access tutoring
*   Case is opened and assigned to a professional staff member who contacts the student
*   Case is opened and assigned to a professional staff member who contacts the student

NOTE: Please do not select more than one alert reason that triggers a case. If you do, multiple cases are opened for the same student through a single alert. If this occurs, the duplicate cases will be closed with the reason of 'Duplicate alerts created; addressing through another alert.'

Case Outcomes – What Do They Mean?

Case Closed Outcomes

Case Outcome	What Does This Mean?	Intervention Steps Taken
Attempted to contact 3x, unable to reach the student	We are unable to reach the student.	At least three attempts have been made to contact the student via phone and/or email. The student has not been successfully contacted. Unfortunately, we are not aware of any additional relationships on campus that we can leverage to reach the student.
Connected student with another support office for next steps	The student has been reached.	A staff member has successfully contacted the student via phone, email, and/or in-person meeting. The concerns listed in the alert will be best addressed by an office who is not currently using Navigate. The student has been connected with the appropriate office(s) to address the concern(s) listed in the alert.
Duplicate alerts created; addressing through another alert	Multiple alert reasons have been selected which triggered more than one case file to be opened for the alert. We will maintain one active case file and close the rest.	One case file will still remain open. You will receive notification that the duplicate case files have been closed before we have finished contacting the student. Once our outreach attempts are completed you will receive notification on the outcome and the one open case file will be closed.
End of term – no resolution	We are unable to reach the student.	The semester has concluded and the concerns of the alert are either unresolved and/or no longer relevant. The student may still be contacted by their academic advisor or other staff member through various intervention efforts and reenrollment efforts that occur at the close of the semester, but no further outreach will be associated with this specific alert.

No action needed	The student has been reached and/or outreach is no longer necessary.	A staff member has successfully contacted the student, and/or staff members assigned to the case provide additional information that indicates outreach is no longer needed.
Staff member will address alert concerns outside of Navigate	Outreach is ongoing.	The concerns listed in the alert will be addressed by an office outside of Navigate, such as CARE Team.
Student plans to drop course or withdraw from university	The student has been reached.	A staff member has successfully contacted the student via phone, email, and/or in-person meeting. They have learned that the student is planning to drop the course related to the alert or withdraw from the term.
Talked with student about alert & steps to resolve the issue	The student has been reached.	A staff member has successfully contacted the student via phone, email, and/or in-person meeting. The concerns listed in the alert have been addressed and the student has been given action steps to take to resolve the concern(s).

Reviewing Alerts

Staff with appropriate permissions can view issued alerts in four different areas within Navigate: Student Profile, Reporting tab, Professor Home page, or Cases tab. **The ability to view issued alerts, case notes, and outcome reasons varies based on the role and access of the individual using the system.** If you are looking for more information about an alert or case than what you are able to view, contact navigate@uww.edu.
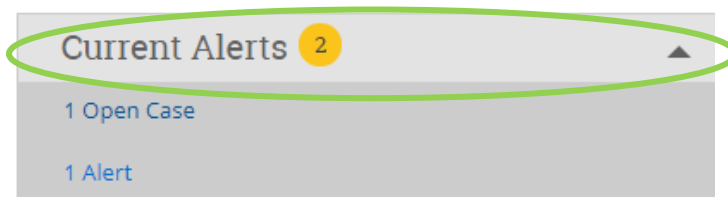
Student Profile
To view alerts on the student profile, go directly to that student's profile within Navigate. On the right side of the profile, the total number of staff alerts for that student is listed at the top right. This count includes all Alerts, Cases, and Progress Reports issued for the student.

Important Note: Because the total count includes all Alerts, Cases, and Progress Reports, you may find duplicate information. For example, if one Progress Report issues one Alert, which in turn opens a Case, the total count will be three to include each of those actions, even though they all originated from the same Progress Report. Be mindful of what the total count means when using that information to inform student interactions.

To view additional information about the issued alerts, either…

1) Click directly on the "1 Alert" hyperlink from the total count
                     - OR -
2) Navigate to the "History" tab of the student profile. Whether you can access this tab depends on your role and permissions granted.

Professor Home

Issued alerts show on the *Professor Home* in the *My Issued Alerts* section (you may have to scroll down the page a bit). This allows instructors to see alerts they have issued in Navigate, including links to any associated Progress Reports or Cases. If you are not an instructor, you will not have access to the Professor Home.

My Issued Alerts will include the date the alert was issued, the student's name, the reasons for the alert, if a case was opened, and if the alert was attached to a Progress Report.

If a case has been opened, faculty can click the case and see a window that explains which alert reasons opened the case, the status of each case, and the case outcome if the case has been closed.

Below is an example of what you would see when clicking on the *Cases* column next to a submitted alert.

CASE INFO ✕

Alert For **Willy Warhawk**
Issued on 02/03/2020 @ 11:10 am

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

Alert Reasons	Status	Case Outcome
Attendance/Punctuality concerns	Closed on 02/03/2020	Talked with student on how to resolve issue

If the alert is linked to a Progress Report, the faculty member will be able to click and open the report.
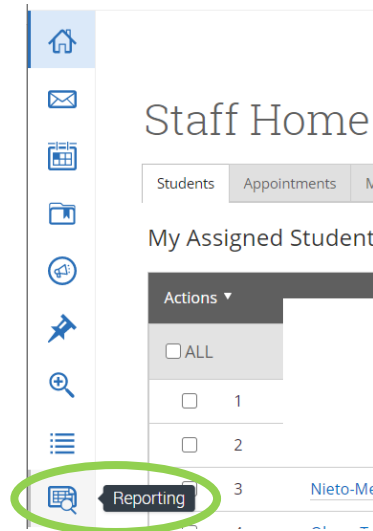
Reporting
To view information about alerts for several students at once, navigate to the "Reporting" tab from the left-hand navigation bar (see image at right).

Based on your permissions, you may be able to view the "Alerts" report, located in the Interventions report section (see image below).

Intervention Reports
Alerts

Progress Reports

🏠
✉
📅
📖
📣
📌
🔍
☰
📰 Reporting

Staff Home

Students | Appointments | M

My Assigned Student:

Actions ▾

☐ ALL

☐ 1
☐ 2
☐ 3   Nieto-Me

In the Alerts report, you can search by keyword, enrollment status, enrollment term, begin date, end date, alert reasons, case issuers, and other filters available in the Advanced Search.

Alerts Report

Below is a report of alerts filed for students

Keywords (First Name, Last Name, E-mail, Student ID)?	Enrollment Status?	Enrollment Term
	Enrolled	2020 Winterim

Begin Date	End Date
12/29/2019	01/04/2020

Alert Reasons
All

- All
- At risk of D or F grade in course
- Attendance/Punctuality Concerns
- Incomplete, missing and/or late assignments
- Low scores on assignments or tests
- Other: add detailed feedback (including positive) in comment
- Sudden decline in performance

Case Issuers
All

Category, Tag, Watch List

2020 Winterim Data Classification, Section Tag, Term GPA

Course Data Course, Section, Status

Assigned To

Success Indicators Success Markers

The report includes the following information: student ID, student name, majors, alert reasons, created at, issued by, associated courses, and tags.
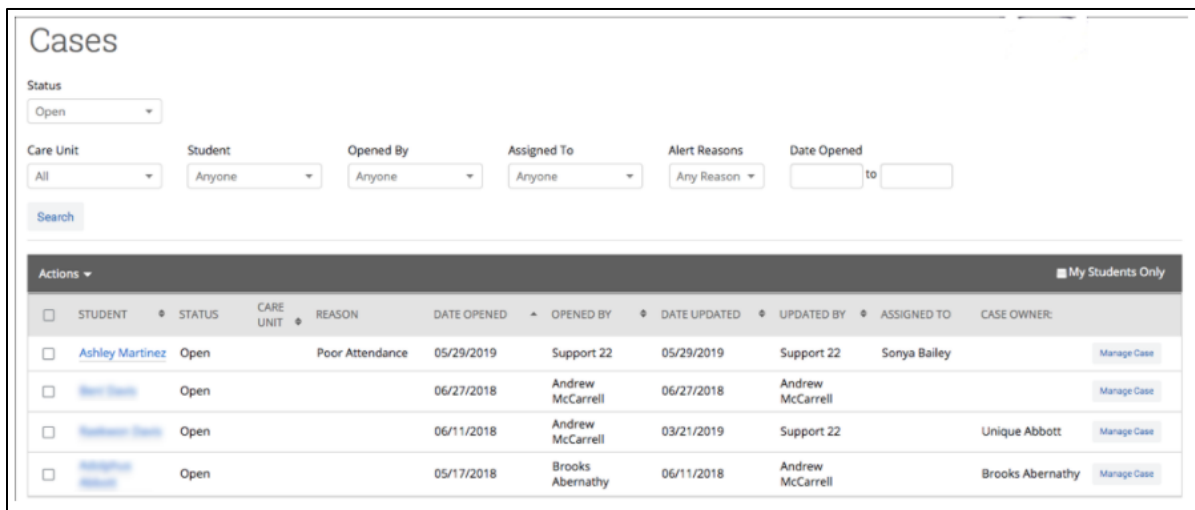
Cases

With the proper permission you can view and manage your open and closed cases from the Cases page, accessible by selecting the "Cases" icon from the left-hand menu. It is a streamlined view where users can access and search all cases they have permission to view in one place.

The Cases page includes the following information:

- **Student**: Name of the student for whom the case is opened.
- **Status**: The status of the case - open or closed
- **Care Unit**: Care Unit the case is associated with. Cases can only be associated with ONE Care Unit, or none at all.
- **Reason**: The alert reason that triggered this case to open.
- **Date Opened**: Date in which case was originally opened.
- **Opened By**: Who issued the alert.
- **Date Updated**: Date the case was last updated. This includes closing the case.
- **Updated By**: Who last updated the Case.
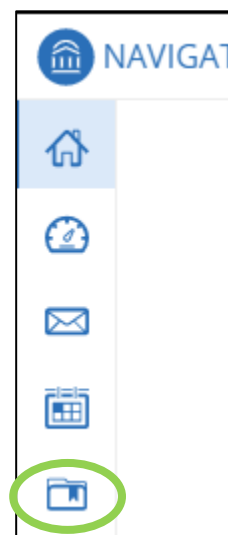
- **Assigned To**: The staff members assigned to monitor the opened case. The person assigned to the case depends on the reason for the alert and a variety of reasons specific to the student (student's advisor, major, academic standing, college, etc.).
- **Case Owner**: The case owner is someone who has been assigned and is managing outreach in the case.


From this page, you can also manage the case by selecting "Manage Case." See the *Case Management* document for more information on how cases are managed.

Case Assignee or Owner

When a case is opened, a message will be sent to all staff assigned to the case, notifying them of the new case. The message will inform the recipient if they have been assigned to the case as an 'Assignee' or the 'Owner' of the case.

- **Assignee**: An 'Assignee' is a staff member who may have knowledge of the alert concern or interactions with the student. *Individuals who submit the alert will be added as an Assignee to the case*. Assignees are not expected to do additional proactive outreach to the student. They should, however, monitor or refer to the case if they come into contact with the student so they can see updates, add notes to the case file if they have contact with the student regarding the concern stated in the alert, and close the case if they are able to address the concern with the student.

- **Owner**: An 'Owner' of a case is the person who is taking the lead on the intervention. This individual will manage the outreach and intervention for the student. If at any point the owner decides another
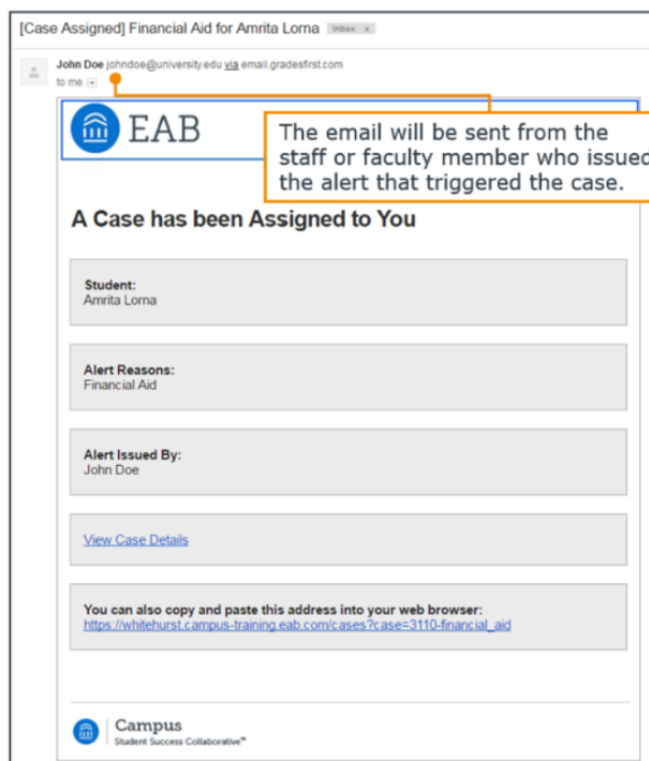
individual should take the lead, they will change the Owner designation to that individual. The new Owner will receive an email stating they have been designated as an Owner of the case.

Please review the 'Case Management' training document for more information about the role of an Assignee vs. Owner of a case.

Case Closed Message

When the case is closed, a message will be sent to the original alert issuer, notifying them that the case has been closed. An example of this email can be found below.

Case Closed

Thank you for your assistance in identifying students who may need additional support by submitting an alert. Outreach efforts have been made and the case is considered 'closed'. This means we have either made contact with the student and discussed the concern, or we made at least three attempts at contacting the student through various means but were unable to reach them. See the *Case Outcome* for more information about this result of the outreach.

To view information about this and other submissions, log into Navigate. You will see information about your alert submissions by clicking on the *Cases* icon on the left side of your home screen. If you need assistance or would like more information, please contact the UW-W Navigate team at navigate@uww.edu.

Student

Student McStudentson, Jr.

Alert Reasons

Attendance and/or participation concerns

Alert Issued on

January 24

Case Outcome

Talked with student about alert & steps to resolve the issue

Closed by

Nathan Callope

Closed on Date

January 24