ALERTS, REFERRALS, & CASES MANAGEMENT PROCESSES

As a department responsible for receiving alerts, referrals, and cases in the Campus Connect platform, it is important to adhere to the management process to provide consistent and streamlined support to students.

The alerts and referrals management processes are dependent on if the alert or referral generates a case. Alerts and referrals that generate a case are meant to provide personnel a centralized location for documentation in showcasing a timeline of outreach and intervention efforts to the student.

Please reference this management guide when coordinating your alerts, referrals and cases to help your department maximize the use of the platform and Coordinated Care Network.

ALERTS / REFERRALS MANAGEMENT WITH **no case**

<table>
<thead>
<tr>
<th>Department</th>
<th>Alert / Referral</th>
<th>Student Notified?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Success Center</td>
<td>Student needs academic support</td>
<td>Yes</td>
</tr>
<tr>
<td>SAM Center</td>
<td>Attendance Concerns</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Career / Major Exploration</td>
<td>Yes</td>
</tr>
<tr>
<td>Services for Students with Disabilities</td>
<td>Services for Students with Disabilities</td>
<td>Yes</td>
</tr>
<tr>
<td>Student Money Management Center</td>
<td>Financial Insecurities</td>
<td>No</td>
</tr>
</tbody>
</table>

The Student Success Technologies department will run the Alerts report in Campus Connect bi-weekly during terms to identify students marked at risk. Upon running the report and identifying the students marked for an alert / referral, data will be sent to departments responsible for interventions (*exception for Services for Students with Disabilities & Academic Success Center*).

- Personnel responsible for outreach should contact the student within **two (2) workdays** of the alert being issued.
- All contacts will be documented in Campus Connect by filing an **Appointment Summary Report** and tagging the service **Alert Contact**.
- Contact methods should vary between email, phone, and text. Personnel should strive for a minimum of **two (2) outreach attempts** to the student. **Within one (1) week**, all contact efforts will be completed.
- Upon gaining contact with the student, personnel should assess the problem and work with the student to **solve** the problem. This may require a scheduled meeting to provide more in-depth services to the student.
➢ The objective is to **engage** the student in a meaningful conversation about the situation and **help** the student get on a path to rectifying the issue using the appropriate available resources.

➢ If personnel identify a need outside of their expertise but **aligns** within the Coordinated Care Network, the personnel will issue the appropriate alert / referral.

➢ If personnel identify a need outside of their expertise and the student needs resources **outside** of the Coordinated Care Network, the personnel will share information about necessary resources and tag the service **Resource Referral** within the Appointment Summary Report. Within the Appointment Summary **notes**, personnel will notate to where the student was referred.

### ALERTS / REFERRALS MANAGEMENT WITH CASE

<table>
<thead>
<tr>
<th>Department</th>
<th>Alert / Referral</th>
<th>Student Notified?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Success Center</td>
<td>Student needs Writing Support</td>
<td>No</td>
</tr>
<tr>
<td>First-Year Experience</td>
<td>First-Year Learning Communities</td>
<td>No</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Behavioral / Family / Medical Concerns</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Food / Housing Insecurities</td>
<td>Yes</td>
</tr>
<tr>
<td>Student Success Technologies</td>
<td>Other</td>
<td>No</td>
</tr>
</tbody>
</table>

Opened cases automatically generate an email to notify the responsible department that a student has been marked at-risk for their alert / referral reason. A department may run the **Cases** report in Campus Connect at their leisure to obtain a holistic view of alerts issued for their area or filter through the Cases icon. As cases are opened and personnel are notified, outreach may begin.

➢ Personnel responsible for outreach should contact the student within **two (2)** workdays of the case being generated.

➢ Contact methods should vary between email, phone, and text. Personnel should strive for a minimum of **two (2)** outreach attempts to the student. Within **one (1) week**, all contact efforts will be completed.

➢ All cases will close within **two (2)** weeks of being opened (**exception for First-Year Learning Communities**).

➢ Upon gaining contact with the student, personnel should assess the problem and work with the student to **solve** the problem. This may require a scheduled meeting to provide more in-depth services to the student.

➢ The objective is to **engage** the student in a meaningful conversation about the situation and **help** the student get on a path to rectifying the issue using the appropriate available resources.
➢ If personnel identify a need outside of their expertise but **aligns** within the Coordinated Care Network, the personnel will issue the appropriate alert / referral.

➢ If personnel identify a need outside of their expertise and the student needs resources **outside** of the Coordinated Care Network, the personnel will share information about necessary resources and tag the service **Resource Referral** within an Appointment Summary Report. Within the Appointment Summary **notes**, personnel will notate **where** the student was referred to.

**CASE MANAGEMENT EXPECTATIONS**

➢ All contact attempts will be clearly and thoroughly documented in the Case on the student’s profile.
  o This includes, but not limited to, calling / texting / emailing content sent to the student and/or including the student in an appointment campaign.

➢ All notes of interactions with the student should be clearly documented in the case so that if there is another alert or if the case is referred to someone else it is clear what the problem is and what has been done to help the student.
  o Reminder, anything shared in the platform is subject to the Freedom of Information Act. Therefore, always use professional discretion.

➢ The case should be closed by the person assigned to the case. If a case is moved to another department that is using case management, then the receiving department will close the case as the new assignee.

➢ When closing a case, personnel may select from the following reasons:
  o **Discussed alert with student**: This closure reason is used when personnel have gained contact with the student and identified that the student has self-corrected and is no longer in need of support or resources.
  o **Duplicate alert**: This closure reason is used in closing multiple open cases on a student to streamline and document efforts in one case for clear tracking purposes.
  o **No longer enrolled in course(s)**: This closure reason is used for instances in which a case is generated, and a student has dropped / resigned from the course(s).
    ▪ Personnel should verify enrollment on the student’s profile **prior** to conducting outreach or including the student in an appointment campaign.
  o **Non-responsive to contacts**: This closure should only be used **after** the case owner has met the minimum contact efforts and exhausted all outreach methods which are clearly outlined in the Case.
- **Referred student to appropriate resources**: This closure reason is used when personnel have held an in-depth conversation with the student that resulted in referring the student to appropriate resources.
- **Student utilized resources**: This closure reason is used when the student utilized resources they referred for within the timeframe allotted for the case to be open.

➢ Upon closing the case, the alert issuer will receive an automatic email from the platform in closing the communication loop.