Retention Alert

Operational Manual

Contents

Retention Alert

Introduction

Students experience a number of challenges that can affect their academic performance. Timely reporting, effective intervention, and sustained follow up can impact whether or not a student achieves success. The goal of this student tracking project is to develop a comprehensive tracking system that will permit early identification of at-risk students, effective intervention, and prevention of negative academic outcomes. This early alert program (Retention Alert) was developed with the assistance of a cross-functional group that included staff, faculty and administrators.

Retention Alert was piloted with developmental education classes, SEM 140, and then Math and Science classes over the course of a year. Our goal was to work closely with the pilot group and use lessons learned to scale up the early alert program. Retention Alert, as of Spring 2017 semester, is now college wide, covering all educational departments.

The purpose of this manual is to familiarize you with Retention Alert. A Frequently Asked Questions section and glossary are included to further assist you. Questions about this program should be directed to:

 Monica Bouman, Director of the Center for Student Success, at 517.796.8411 (mbouman@jccmi.edu)

Terry Anderson, Supplemental Support Specialist, at 517.990.1459 (andersoterrencp@jccmi.edu)

Susan Risner, Enterprise Technologies Specialist, at 517.796.8687 (risnersusanl@jccmi.edu)

OVERVIEW OF RETENTION ALERT

Listed below is a brief overview of how the Retention Alert system works.

*You can also watch a video demonstrating initiating a Retention Alert case.

Faculty	1. Go to your class roster in e-services and click on the student's name. 2. Click on '***Contribute Retention Info'.*** 3. Select '***Type of Issue'*** from the drop down list. 4. Enter a "Summary" of the issue by using Key words, such as "Failing Exams". 5. Enter your "Detailed Notes". 6. Check off the contact you have had with the student about this issue. Check all that apply (**NOTE**: It's optimal to have the instructor share concerns with the student prior to a referral). 7. Click '***Submit'***. This will create a case for this student. 8. The case # as well as the specific person whom the case is assigned to will be displayed on the screen. 9. *For severe behavior issues, follow the Code of Conduct procedures.*
Routing	After the instructor presses '***Submit'***, the case is routed automatically to a **Navigator.**
Navigator	The Navigator opens up the list of cases from e-Services, reads the instructor's notes and contacts the student based on the level of priority of the case. Depending on the urgency of issue, the contact might be a call or an email. The case manager might urge the student to attend a test-preparation workshop, seek tutoring, go to Supplemental Instruction sessions, meet with the advisor, and so forth. The results of that contact are entered into the case.
Follow Up	Instructors can go into '***My Contributions to Cases'*** to see who the Navigator is for each of their referred cases and to see if the case is open or closed. Upon closing the case, the Navigator will email the instructor to provide general feedback on the outcome(s) of the case. Navigators will also forward information to group leaders, when necessary, such as coaches, American Honors, Housing, etc.

HOW INSTRUCTORS ACCESS RETENTION ALERT THROUGH THEIR CLASS ROSTER

1. Click on '*class roster*"
2. Click on '*student name'*
3. Click the '*Add Retention Alert Info'* tab, located at the bottom of the page

Student ID

Preferred Name   Keith

Address

E-mail Address	**Type**
	JCC Provided e-mail
	Internet

Phone Number	**Extension**	**Type**
		Message Phone
		Cell Phone

Academic Program	**Academic Level**	**Catalog**	**Degree**	**Anticipa**
AAS - Business Administration	UG	2012-2013 Catalog	AAS	

Advisor	**Advisor Type**	**Phone Number**	**Extension**	**E-mail Address**	**Offi**
None Specified					

Emergency Contact Name	**Daytime Phone**	**Evening Phone**	**Other Phone**	**R**
None Specified				

Counselor	**Counselor Type**	**Phone Number**	**Extension**	**E-mail Address**
None Specified				

Foreign Language Information | None available |

Add Retention Alert Info ⬅

4. Enter the retention information

Contribute Retention Info

*= Required

Retention Case for Linda L. Coolman

Type of Issue*	Misplaced Students (higher Course)
Summary*	Took and passed MATH placement test
Detailed Notes*	This student passed the Math placement test and should be in Calculus I.

Did you contact this student? Check Any that Apply

In person	☑
E-mail	☐
Phone	☐
Fax	☐
IM (Instant Message)	☐
Standard mail	☐
Voice mail	☐
Text message	☐

Do you want to report additional issues regarding this student? ☐

SUBMIT

Type of Issue: Select the type of issue from the drop-down box.

Summary: Include a synopsis or summary of the issue. Use this field to enter information that will help the case owner see at a glance what this case is about. The information that you enter into the Summary field will be displayed on the *Work the Case* form, which is used by the case owner.

Detailed Notes: Use this field to enter all of the information about the issue. Add details that will help the case worker determine the proper plan of action. Be specific and use Descriptive language.

Did you contact this student?: Check the type of communication you've had with the student.

Report Additional Issues: If you want to add another issue to this case for this student, check this box. You will be taken back to this form to enter the information.

5. **Click** the [SUBMIT] button.

6. Review the confirmation that appears on the screen

Case Confirmation Form

Your information regarding Linda L. Coolman has been recorded in case #216.
The case is assigned to: SRIM.

6a. **If an instructor checked in step #5 that he/she has additional issues to report**, the instructor will see the same box that is displayed in step # 5. The instructor can enter the information for the second issue with the box for additional issues unchecked (if there are more issues to report, the instructor can continue to keep the box checked until all the issues regarding that student is entered).   The case number and assignment for the first case is shown at the top of the screen.

WORKING YOUR CASE

When working a case, you will be able to view the referral notes, add your own notes and contact the student and instructor via email through the retention alert system. Cases assigned to you will be routed to '*My To Do List'*.

Purpose	The purpose of this documentation is to outline the steps of how to work cases from the *'My To Do List'*.
Log into e-Services	1. Enter your username and password. 2. Click the [SUBMIT] button.
Click the Advisors Tab	
Click the 'My To Do List' link	3. Click *'My To Do List'* 4. Under the 'Advisors Information' menu, click the *'My Contributions to Cases'* hyperlink.
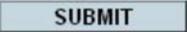
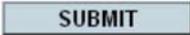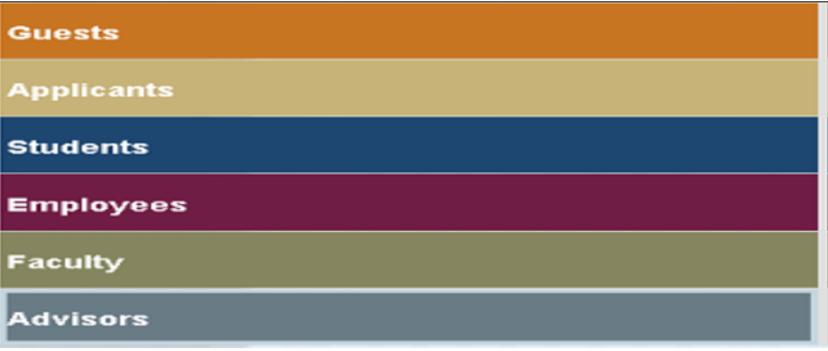|	
Click the case you wish to work	**My To Do List** 	Pending Worklist Items	Escalate	Reminder	Item Created	Assignment	Priority	Workflow Initiator	Workflow Age	Private
---	---	---	---	---	---	---	---	---
summarized case, REPEATS_MAT category, 205 items		03/06/13		Summary	Low			N
(New Info) Lerma, Osbaldo; MyMathLab case 215		03/07/13	03/06/13	MyMathLab Workshop Leader	Medium	D. McNally	0 days	N
Lerma, Osbaldo; General case 212		03/07/13	03/06/13	OMBUDSMAN	High	D. McNally	0 days	N
(New Info) Lerma, Osbaldo; MAT Competency case 213		03/07/13	03/06/13	COMPETENCY WORKSHOP LEADER	High	D. McNally	0 days	N
(New Info) Coolman, Linda; Advisor case 216		03/07/13	03/06/13	SRIM	High	D. McNally	0 days	N
(New Info) Lerma, Osbaldo; Academic - Math case 214		03/07/13	03/06/13	SRIM	Medium	D. McNally	0 days	N	 5. To view the specific information about each case, click on *'Pending Worklist Items'*. 6. You will be directed to the *'Work the Case'* form.
Work the case	**Work the Case** * = Required Student Osbaldo Lerma (0003376) Case 215, MyMathLab Priority Medium Created By Dixie A. McNally Owner MyMathLab Workshop Leader **Case Types** Not Logging into MyMathLab Expanded Case History 	Date	Summary	Reminder Date	Added By	Contribution Case Type	Contact Methods Used
---	---	---	---	---	---

03/06/13	test	03/07/13	Dixie A. McNally	Not Logging into MyMathLab		
						
						Information Links: Student Profile Student Transcript Student GPA by Term Test Summary Student Ed Plan (Inquiry) Student Schedule
						
						Choose an Action* [▼]
						
						Add a Note
						Send E-Mail
						Set a Reminder
						Manage Reminder Dates
						Change Priority
						Reassign Case
						Close the Case
						Go to My To Do List
						Go to Cases for Student
						
						[SUBMIT]
						
						LOG OUT
							MAIN MENU	ADVISORS MENU	HELP	CONTACT US
										
										WebAdvisor₃.₁ POWERED BY DATATEL
										
										7. To view the details of the case, click *'Expanded Case History'* or *'Summary'.*
										8. Choose an action:
										   a. **Add a note** – you will be directed to the *'Add an Internal Case Note'* form. Here you can add a summary, detailed notes and set a case reminder.
										   b. **Send an Email** – you will be directed to the *'Send an Email'* form. Here you can choose to email the student, the contributor of the case, and if the student is in classes, the student's instructors.
										   c. **Set a Reminder** – you will be directed to the *'Set a Case Reminder'* form. Here you can enter a reminder date, summary, and detailed notes.
										   d. **Manage Reminder Dates** – you will be directed to the *'Manage Reminder Dates'* form where you can review previous reminder dates and also clear dates.

	e. **Add Another Type to Case** – you will be directed to the *'Add Another Type to case'* where you will be able to add additional items and detailed notes to your case. f. **Change Priority** – you will be directed to the *'Change Case Priority'* form where you will be able to set the case's priority to high, medium or low. g. **Close the Case** – you will be directed to the *'Close the Case'* form where you will be able to close the case, add a summary, and detailed notes. This action will remove the case from your workload. h. **Go To My Do List** – you will be redirected back to your work list. i. **Go to Cases for Student** – you will be directed to the *'Retention Cases for Student'* form. 9. Click the SUBMIT button

CONTRIBUTING TO AN EXISTING CASE

Purpose	The purpose of this document is to outline the steps of how to contribute retention information through the Contribute Retention Information workflow in WebAdvisor.
Log into e-Services	 1. Access **e-Services**. 2. Enter your username and password. 3. Click the SUBMIT button.
Click the Advisors Tab	

	Guests **Applicants** **Students** **Employees** **Faculty** **Advisors** 4. This document will follow the Advisors Tab
Click the 'Contribute Retention info' link	Contribute Retention Info 5. Under the *'Advisor Information'* menu, click the *'Contribute Retention Info'* hyperlink.
Enter the student's name or ID	**Find Student** First, find the student: ID or Name of Student [ ] SUBMIT 6. To find a student, enter the **student's name** or **ID** at the prompt. 7. If there is only one student with that name or ID, then you will be taken directly to the *'Contribute Retention Info'* form. Otherwise, you will be given a choice of students and have the ability to select which student you want to enter information for. 8. Click the SUBMIT button.

Enter the retention info	**Contribute Retention Info** * = Required Retention Case for Linda L. Coolman Type of Issue* — Misplaced Students (higher Course) [dropdown] Summary* — Took and passed MATH placement test Detailed Notes* — This student passed the Math placement test and should be in Calculus I. Did you contact this student? Check Any that Apply In person — ☑ E-mail — ☐ Phone — ☐ Fax — ☐ IM (Instant Message) — ☐ Standard mail — ☐ Voice mail — ☐ Text message — ☐ Do you want to report additional issues regarding this student? ☐ SUBMIT 9. **Type of Issue**: Select the type of issue from the drop-down box. 10. **Summary**: Include a synopsis or summary of the issue. 11. **Detailed Notes**: Use this field to enter all of the information about the issue. Add details that will help the case worker determine the proper plan of action. Use **descriptive language**. 12. **Did you contact this student?:** Check the type of communication you've had with the student. 13. **Report Additional Issues**: If you want to add another issue to this case for this student, check the box at the bottom of page. You will be taken back to this form to enter the information. 14. Click the **SUBMIT** button
Review your receipt	**Case Confirmation Form** Your information regarding Linda L. Coolman has been recorded in case #216. The case is assigned to: SRIM. 15. The Case Confirmation Form confirms that your contribution was successful and provides you with the case number and a list of assignees for the case to which you just contributed.

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SETTING A CASE REMINDER PREFERENCE

Purpose	The purpose of this documentation is to outline the steps of how to specify whether you want to receive case reminders by e-mail for cases you own.
Log into e-Services

1. Access the **e-Services**.
2. Enter your username and password.
3. Click the **SUBMIT** button. |
| **Click the Advisors or Faculty Tab** |

4. This document will follow the Advisors Tab |
| **Click the 'Retention Case Reminder Pref' link** | Retention Case Reminder Pref

5. Under the *'Advisor Information'* menu, click the *'Retention Case Reminder Pref'* hyperlink. |

Set your preference	 6. Set your preference by using the drop-down box. 7. *Select 'Yes'* to be reminded of cases by email. 8. Click the ⬜ SUBMIT button.

CLOSING A CASE

There are two steps to closing a case after you have logged on to Retention Alert:

Step 1: For Closing a Case

Purpose	The purpose of this document is to outline the first set of steps to closing a case.
Log into e-Services	

	1. Access **e-Services**
	2. Enter your username and password.
	3. Click the [SUBMIT] button.
Click the Advisors Tab	
	4. **This document will follow the Advisor Tab**
Click the 'My To Do List' link	5. Click on *'My To Do List'*
	6. Under the *'Advisors Information'* menu, click the *'My Contributions to Cases'* hyperlink.
Click the case you wish to work on	
	6. To view the specific information about each case, click on *'Pending Worklist Items'*.
	7. You will be directed to the *'Work the Case'* form.

Work the case	**Work the Case** * = Required Student Osbaldo Lerma (0003376) Case 215, MyMathLab Priority Medium Created By Dixie A. McNally Owner MyMathLab Workshop Leader **Case Types** Not Logging into MyMathLab Expanded Case History | Date	Summary	Reminder Date	Added By	Contribution Case Type	Contact Methods Used
---	---	---	---	---	---
03/06/13	test	03/07/13	Dixie A. McNally	Not Logging into MyMathLab		 Information Links: Student Profile Student Transcript Student GPA by Term Test Summary Student Ed Plan (Inquiry) Student Schedule Choose an Action▾ Add a Note Send E-Mail Set a Reminder Manage Reminder Dates Change Priority Reassign Case Close the Case Go to My To Do List Go to Cases for Student SUBMIT LOG OUT MAIN MENU ADVISORS MENU HELP CONTACT US WebAdvisor 3.1 8. Choose '***Send Email'*** 9. Click the ⬚SUBMIT⬚ button
Send E-mail	ADVISORS Welcome Slandah! **Send Case E-Mail** * = Required Student Linda Coolman (0004112) Case 216, Advisor From: DieujusSlandah@jccms.edu 	E-mail Action	Name	Relation to Case	E-mail address
---	---	---	---
▾	Linda L. Coolman	Student	CoolmanLindaL@my.jccms.edu
▾	Slandah Dieujuste	Contributor to Case	DieujusSlandah@jccms.edu
▾	Yvonne S. Freeman	Instructor of 13/WN LTL-582-02	FreemanYvonneS@JCCMI.EDU
▾	Dixie A. McNally	Contributor to Case	McNallyDixieA@jccms.edu	 	E-mail Action	Additional E-mail Addresses
▾	
▾	
▾	| Subject → E-mail Text* → Set a Case Reminder? ☐ SUBMIT 10. **Send an Email** – you will be directed to the *'Send an Email'* form. Here you can decide to email the student, the contributor of the case, and the student's instructors. 11. Write the **summary of the case** on the subject line and use the text box provided for the content of the email. 12. Click the ⬚SUBMIT⬚ button 13. Once you submit, your email will automatically become part of the student's records in Retention Alert. **Note:** In compliance with FERPA policy, you may not be able to provide detailed notes to the referring faculty. Notes should be professional and free from subjective judgments. Once you click submit, your notes will automatically become part of the student's records in Retention Alert.

Step 2: For Closing a Case

Purpose	The purpose of this document is to outline the second set of steps to closing a case
Work the Case	 1. You will be directed to this page after your email has been sent from the previous steps to closing a case. 2. Choose *'Close the Case'* from the drop down menu
Close the Case	 3. Select the appropriate reason for closing case. 4. Provide a summary of the case outcome. 5. Provide any detailed notes on the space provided.

Frequently Asked Questions

1. ***Doesn't that create inefficiencies to have multiple people working separately if there are multiple cases created?***

   No. The Navigators are assigned to specific students, so if a student receives multiple Retention Alert cases, they will all go through the same Navigator, who will also inform any other necessary parties, such as athletic coaches, housing, etc.

2. ***What happens after an instructor submits a case?***

   All case types are routed to a Navigator on all campuses, specific to the intervention strategy we currently practice. That Navigator will receive an email notifying them of the case and they will begin outreach within a set timeline.

   If the designated Navigator is on vacation, their cases can be reassigned to a backup. Navigators must alert Sue Risner (RisnerSusanL@jccmi.edu) if they will be out of the office so the case manager's cases can be routed to another Navigator.

3. ***Will an instructor be notified once a case is closed?***

   Yes, Navigators are expected to use the email feature in My To Do List to notify the instructor of the case outcome(s).

4. ***Why can't an instructor see the case he/she has created?***

   All the cases that an instructor has created can be viewed under My Contributions to Cases. In compliance with FERPA, instructors are only able to view their own cases.

5. ***Can an instructor add new information to contribute to an existing case?***

   Yes! They can easily add to an existing case they have created by clicking on *Contributing to an Existing Case.*

7. ***What if I don't feel equipped to handle the situation that the student presents (i.e. shared thoughts of suicide or violence)?***

IF YOU ARE ON THE PHONE WITH THE STUDENT:

- **Convey Empathy:** *e.g.* "I'm so sorry to hear you're going through such a difficult time." Or "It sounds like you are really struggling."
- **Offer Support:** *e.g.* "This is not my area of expertise, but I would like to refer you to someone who has the expertise to help." Or "Since I'm not a mental health expert, I'm going to have someone contact you who can offer more direction than I'm able to."
- **Document the Interaction & Forward Immediately:** Forward to Monica Bouman, CSS Director, at 517.796.8411 or mbouman@jccmi.edu.

IF YOU ARE MEETING WITH THE STUDENT FACE-TO-FACE & <u>NOT COMFORTABLE</u> DISCUSSING THE CONTENT THE STUDENT HAS PRESENTED:

- **Find a Private Space:** Disclosure of concerning information may take place in an open room where others can hear creating discomfort for the student and others nearby. Say "Let's step into a room with more privacy."
- **Be Alert to Your Own Safety:** Do NOT seek privacy if concerning behavior is threatening, violent, or disturbing. Do whatever is necessary to discretely alert other staff in your area. (***NOTE***: *We will develop a code that allows for staff to alert each other of a critical situation*).
- **Convey Empathy:** *e.g.* "I'm so sorry to hear you're going through this difficult time." Or "It sounds like you are really struggling."
- **Offer Referral:** *e.g.* "This is not my area of expertise, but I can refer you to someone who has the expertise to help." Or "Since I'm not a mental health expert, I'm going to have someone contact you who can offer better direction than I'm able to."
- **Give Referral (even if refused):** The student may reject the idea that he/she needs help. Regardless, refer them to the Oasis center or health clinic in JW 111 and encourage them to call 517.990.1374.
- **Reassure Them: "**There are people who can help get you through this. Staff in the Oasis Center or Center for Student Success (CSS) can help connect you to professionals who can assist you. CSS is located in Bert Walker Hall, Rm 138. You can also reach Monica Bouman, CSS Director, at 517.796.8411 or boumanmonical@jccmi.edu."
- **Walk them Over to the Oasis Center or CSS:** If you are able, offer to walk the student to CSS.
- **Document the Interaction & Forward Immediately:** Forward to Monica Bouman, CSS Director, at 517.796.8411 or mbouman@jccmi.edu.
- **NOTIFY SECURITY IF THREAT IS IMMINENT:** *If the student conveys imminent plans for self-harm or violence to others, contact security immediately at 517.796.8620 or call 911. If the student leaves, try to follow them at a safe distance and notify security.*

IF YOU ARE MEETING WITH THE STUDENT FACE-TO-FACE & <u>ARE COMFORTABLE</u> TALKING TO THE STUDENT -- The 2 critical differences here (highlighted below) will be that you are willing to explore the situation with the student in greater detail. You also can get important information by assessing the severity of risk.

- **Find a Private Space:** Disclosure of concerning information may take place in an open room where others can hear creating discomfort for the student and others nearby. Say "Let's step into a room with more privacy."
- **Be Alert to Your Own Safety:** Do NOT seek privacy if concerning behavior is threatening, violent, or disturbing. Do whatever is necessary to discretely alert other staff in your area. (***NOTE****: We will develop a code that allows for staff to alert each other of a critical situation*).
- **Convey Empathy:** *e.g.* "I'm so sorry to hear you're going through this difficult time." Or "It sounds like you are really struggling."
- **Explore source of distress**: *e.g.* "This is not my area of expertise, but can you tell me what's going on to make you feel this way?"
- **Assess the severity:**
  "Do you have a plan?"
  "Do you have the means to carry out that plan?"
- **Give Referral (even if refused):** The student may reject the idea that he/she needs help. Regardless, refer them to the Oasis Center or health clinic in JW 111 and encourage them to call 517.990.1374.
- **Reassure Them:** "There are people who can help get you through this. Staff in the Oasis Center or Center for Student Success (CSS) can help connect you to professionals who can assist you. CSS is located in Bert Walker Hall, Rm. 138. You can also reach Monica Bouman, CSS Director, at 517.796.8411 or boumanmonical@jccmi.edu."
  Walk them Over to the Oasis Center or CSS: If you are able, offer to walk the student to CSS.
- **Document the Interaction & Forward Immediately:** Forward to Monica Bouman, CSS Director, at 517.796.8411 or mbouman@jccmi.edu.
- **NOTIFY SECURITY:** *If the student conveys imminent plans for self-harm or violence to others, contact security at 517.796.8620 or 911 immediately. If the student leaves, try to follow them at a safe distance and notify security.*

AFTER <u>ANY</u> INTERACTION THAT RAISES CONCERNS OR RED FLAGS FOR SAFETY:

- **Document your conversation by making a Retention Alert referral**. If you feel that the student is not an immediate threat to self/other, you can specify whether or not you would like us to still follow up with the student.

- If the student says he/she intends to harm him/herself and has a plan, DO NOT leave the individual alone. Immediately, contact 911 and Campus Security at 517.796.8620.