

# CUNY School of Professional Studies

Navigate Staff

Ad-Hoc Alerts & Case Management

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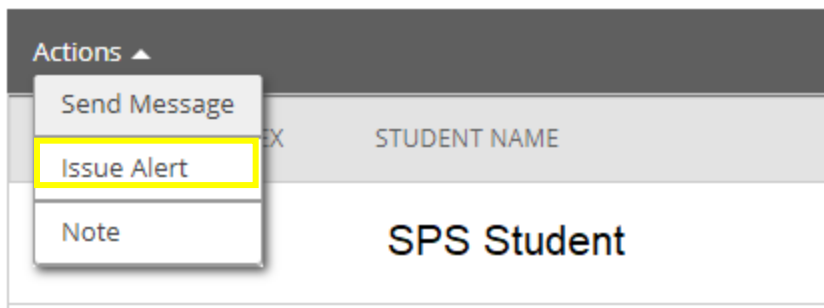
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# Creating Ad-Hoc Alerts

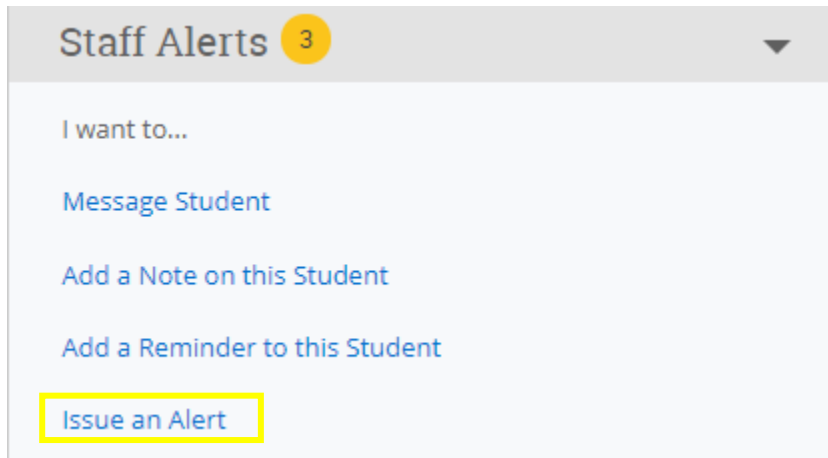
You can issue an ad hoc alert on a student at any time throughout the platform. There are **three** ways for a professor to issue an alert. The recommended way is listed first:

1. **Recommended**- put a check in the box next to the student that the professor would like to issue an alert for and under action, select "Issue Alert". This is in the professor's home page, in the "Students In My Classes" section.

## Students In My Classes



2. Issue an alert in the student's profile (top right corner, there is a "I want to..." section).



3. Issue an alert on the professor's home screen (top right corner, there is a "I want to..." section).



Selecting “Issue an Alert” will open the alerts dialogue box. Please see the screenshot below.

ISSUE ALERT

Student SPS Student

Please select the reason you believe this student needs assistance

Select at least one

Is this alert associated with a specific class?

Optional

Additional Comments

Please enter a comment.

Cancel Submit

- **Alert Reason:** Select one reason for issuing this alert.
- **Association with Specific Course:** You may also choose to associate this alert with a specific course in which the student is currently enrolled. You can only select one course. This field is optional.
- **Additional Comments:** Enter all comments related to this alert. Only those staff or faculty with proper permissions will be able to view the alert and its comments. There is no character limit to this field.

## **Ad-hoc Alerts - Frequently Asked Questions (from EAB resources)**

*What is an ad hoc alert?*

Ad hoc alerts are a way to draw attention to a student who may potentially be at-risk or have an issue in a particular area. Alerts can notify different departments using the platform, as well as the student. In addition, an alert may trigger the opening of case. These alerts may be issued at any time by any staff or faculty member with the proper permissions in the platform.

*How do ad hoc alerts differ from alerts issued through Progress Reports?*

Progress reports campaigns are initiated by administrators and are meant to be a proactive method to get feedback about students. Faculty members are usually the users who submit progress reports and those can be in response to campaigns or ad hoc. Some alert reasons will be the same for a progress report and an ad hoc alert. Both have alert reasons that are configured in the Alert Reasons section of the Administration page.

*Can students ever see the ad hoc alerts submitted on them in Navigate Staff?*

No. Students cannot view their issued ad hoc alerts within the Navigate Staff platform. However, if your institution has configured the alert notification emails, then students may get an email after those alerts are issued, and the email may include the alert reason. Please speak with your Application Administrator if you are unsure what information students receive via email about the alerts issued.

*Can I edit alerts?*

It is not possible to edit ad hoc alerts once submitted. However, it is possible to edit alerts issued through Progress Reports, if the staff member has the proper permissions to do so.

*Can I delete alerts?*

In general, alerts cannot be edited or deleted. If a case is associated with the alert and the case is deleted, only then will the relevant alert be deleted.

*What happens if an alert is submitted for a specific course and the student then drops that course?*

The alert will remain on the profile, but the course will no longer be associated.

# Case Management

To track all the cases that were opened by the issued alerts, go to the Navigate “Cases” Dashboard.

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Cases for Students Enrolled in Selected Term

Status: Open

Care Unit: All Student: Anyone Opened By: Anyone Assigned To: Anyone Alert Reasons: Any Reason Date Opened: [ ] to [ ]

Search

By clicking into the Navigate “Cases” Dashboard, you will see all the cases for the selected term.

To see closed cases, change the status drop down from "Open" to "Closed".

Click on "Opened By" and select your name to filter on cases that you've opened.

## Cases for Students Enrolled in Selected Term

Status: Open

Care Unit: All Student: Anyone Opened By: SPS Professor (Me) Assigned To: Anyone Alert Reasons: Any Reason Date Opened: [ ] to [ ]

Search

STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:	
Student A			3. Missing/Late assignment(s) (specify assignment)	03/19/2020	SPS Professor	03/19/2020	SPS Professor	Advisor A		<a href="#">Manage Case</a>

Click on “Manage Case” and see case activity (view/add comments) for a particular student.

Once you are ready to work on the case, go to “Manage Case” and you will see the following screen.

The screenshot displays the 'MANAGE CASE' window. At the top, the title 'MANAGE CASE' is visible with a close button (X) in the top right corner. The main content area is divided into several sections:

- Student A:** Includes the reason '3. Missing/Late assignment(s) (specify assignment)' and the class 'NURS-301-05-LEC Health Assessment and Promotion in Nursing Practice within Culturally Diverse Populations'.
- Owner:** A dropdown menu currently showing 'Select an owner'.
- Assignees:** A list box containing 'Advisor A'.
- Buttons:** 'Discard' and 'Save Changes' buttons are located below the assignees list.
- Case Activity:** A log of actions dated 03/19/2020:
  - SPS Professor assigned case to .Advisor A. (05:53AM)
  - SPS Professor opened case. (05:53AM)
  - SPS Professor added comment: 'Still missing Week 1 Academic Policy Attestation Post. Needs assistance with writing, following rubric guidelines and APA formatting' (05:53AM)
- Bottom Section:** Features an 'Add Comment' button, a 'cancel' link, and a red 'Close Case' button.

Once you have added your comments, you can close the window by clicking the "X".

Clicking on "Add Comment" will allow you to record notes on the case.