Retention Alert Procedures & Notes for Advisors

Created: SP 10/7/2022

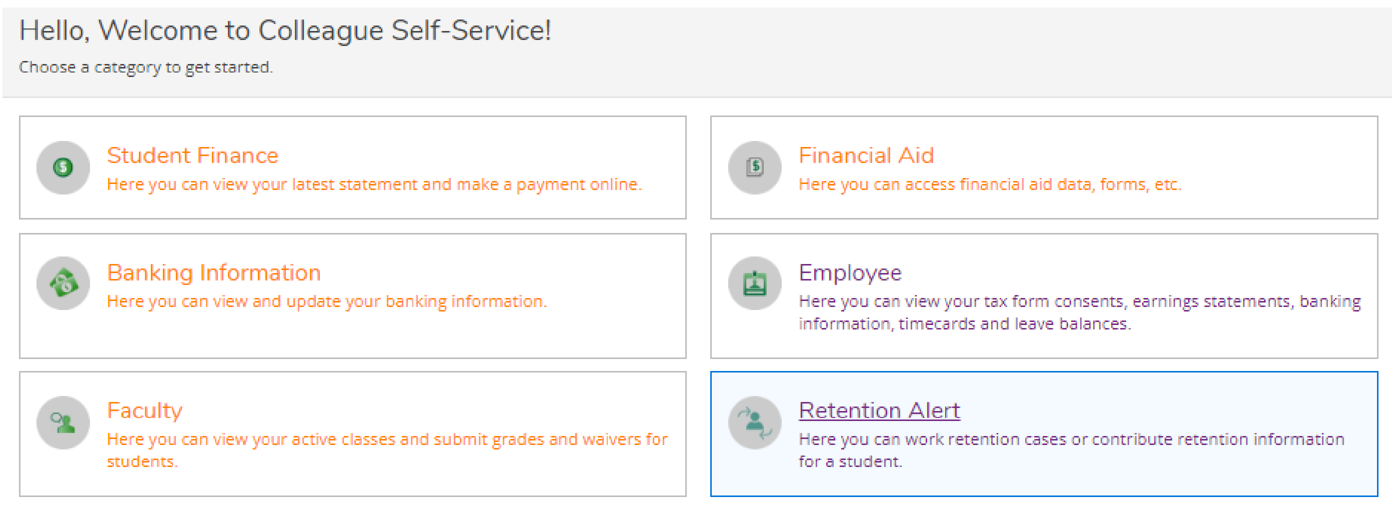
Getting Started:

This module is a preventative measure for retaining students that are in danger of withdrawing or taking a leave of absence.

NOTE: Faculty Advisors – If you have cases still open when your contract is coming to an end, reassign these cases to the Retention Officer role before your contract ends.

First, you'll login to our Self-Service Portal.

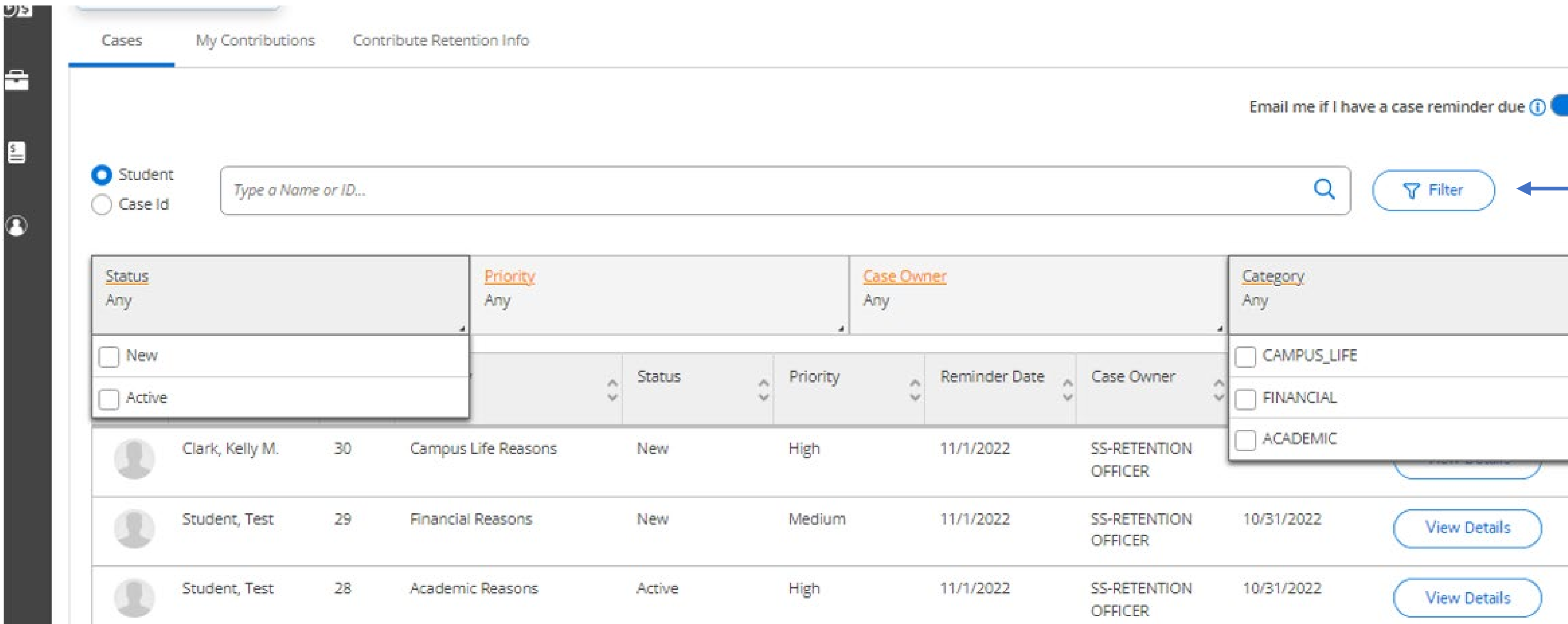
Once you're logged in, select Retention Alert from the homepage.



Retention Alert Landing Page

Here you will view all open cases that have been assigned to you.

You may add a filter to view newly assigned cases or active cases that you have worked on.



There may be more than one case for a student since cases are separated by Case Category. Select **View Details** to **Work the Case** or take an [action] on a case

Work the Case

Student, Test
2036673

Case ID:	29
Created By:	Sabina Pasillas
Case Owner:	SS-RETENTION OFFICER
Case Types:	Other Financial Reasons (please Specify)
Category:	Financial Reasons
Case Priority:	Medium

Case History

Date:	10/31/2022 9:23:01 PM	**Case Type:**	Other Financial Reasons (please Specify)
By:	Pasillas, Sabina	**Reminder Date:**	11/1/2022
Summary:	Testing		
Detailed Notes:	Testing financial reasons Case type of Other Financial Reasons (please Specify) Reminder date automatically defaulted to tomorrow		

Actions

Choose an action...

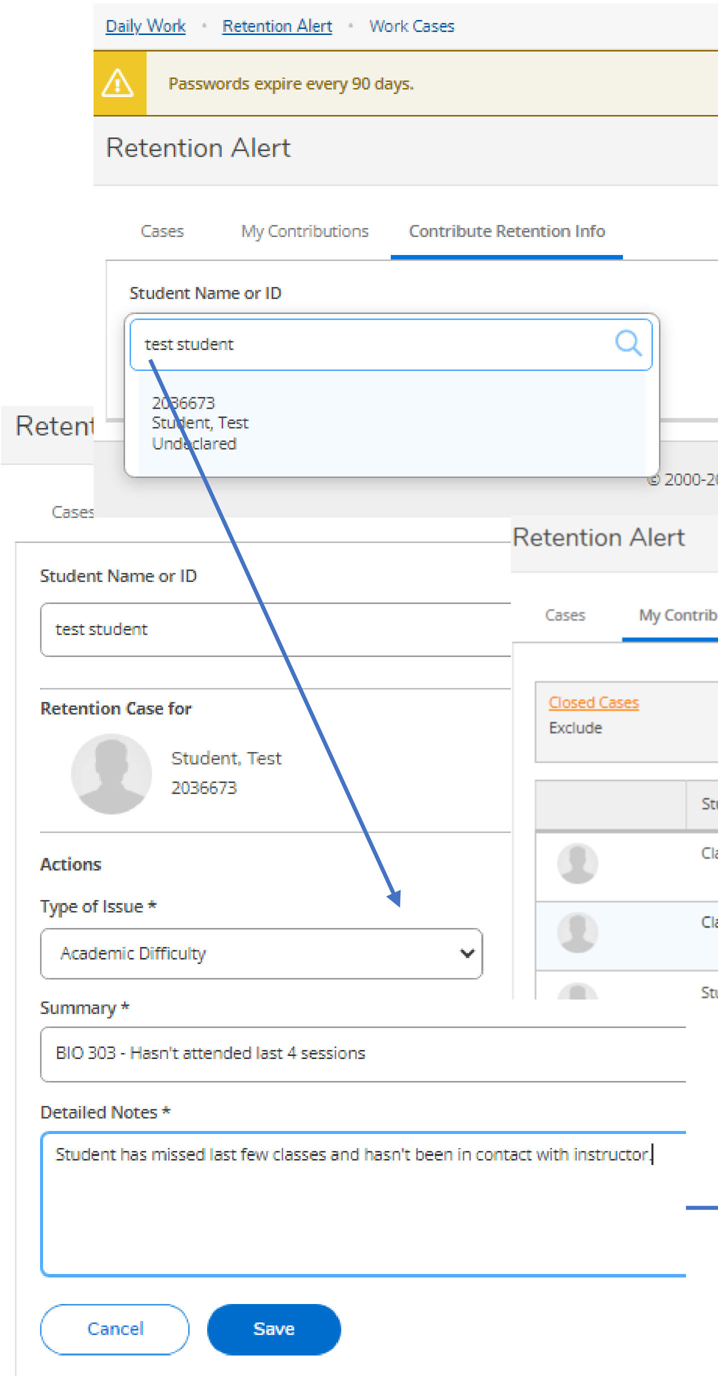
- Choose an action...
- Add a Note
- Add Another Type to Case
- Send an Email
- Change Priority
- Close the Case
- Reassign Case
- Set a Reminder
- Manage Reminder Dates

Table 1: Actions available from the Work the Case page

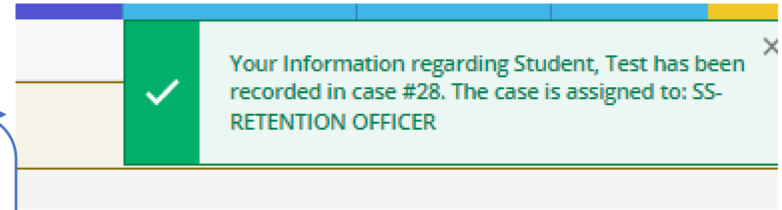
Action	Allows you to...
Add a Note	Add a note to an existing retention case. This information can be based on your interaction with the student or on discussions with others involved in the retention case.
Send email	Compose and send an email to anyone involved with the retention case. You can either choose one student who the case is assigned to, or all those who have contributed to the case, or the instructors of courses the student is currently enrolled in.
Set a Reminder	Record dates that are important to this retention case. If the case owner has elected to receive case reminder e-mail, they will receive an e-mail alerting them that they have at least one date that needs to be reviewed.
Manage Reminder Dates	Remove existing reminder dates from a retention case. Removing these dates clears the associated date field for those reminders. It does not delete the reminder case item. Ellucian recommends that you clear a reminder date as soon as you have taken any necessary action for that reminder.
Add Another Type to Case	Add an additional type to a retention case. [CAN ONLY FALL UNDER SAME CATEGORY]
Change Priority	Change the priority of a case if the circumstances surrounding the case change. The student's performance might improve, or decline, and you would reflect that by changing the priority of the case.
Reassign Case	Reassign a case when you want to change the case owner. **Note**: If a student decides to WD/LOA, reassign the case to the SS-Retention Officer role with a note to alert the team to contact the student. (TRAD ONLY) Be sure to uncheck your name when reassigning to another user.

Close the Case	Close a retention case. You can close a case when the student is no longer a retention risk. **Note**: Close the case under the reason of "Counseling" if sending the student to the Counseling Center. CASES CANNOT BE REOPENED.

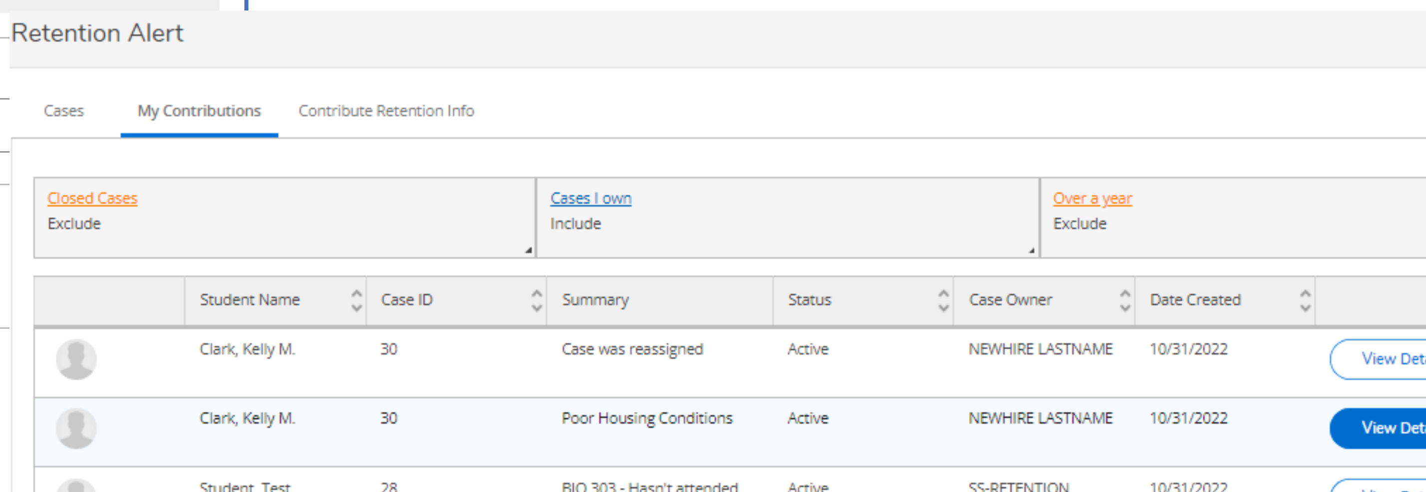
Case Contribution/Creation Workflow



This notification will appear after you successfully save your contribution.



View your contribution after refreshing the page in the **My Contributions** tab



Summary format: **'Category Type: Personalized Brief summary.'**

View My Contributions

Student, Test
2036673

Case ID: 28
Case Owner: SS-RETENTION OFFICER
Category: Academic Reasons

Contributions

Date:	10/31/2022 9:28:24 PM	**Case Type:**	Stopped Attending
By:	Lastname, Newhire	**Reminder Date:**	11/1/2022
Summary:	BIO-311		
Detailed Notes:	Missed last 4 classes, reached out by email but no response. Case type of Stopped Attending Reminder date automatically defaulted to tomorrow		

Retention Case Follow up

Summary *

Student attended last class

Detailed Notes *

Spoke with student and made a plan to complete missing assignments.

Cancel Save

To add an update to a contribution you made, go to **My Contributions** -> **View Details** -> Add a **Retention Case Follow up**

Cases

Use the Work the Case page to begin working on a new case, or to take action on an existing case. You can use this page to view general information about the case currently assigned to you. You can also take action towards completing your work on the case.

Procedure

1. To work a case, click the **View Details** button on the **Cases** tab to access the **Work the Cases** page for that case.
2. On the **Work the Case** page view the following information about the retention case:
    - **Expanded Case History:** Case History of the case. Here you can view all information contributed to the same case by you and others.
    - **List of Case Items:** Shows the individual actions taken in the case, showing the most recent actions first.
    - **Choose an Action:** Actions drop-down list allows you to take action on a case.

My Contributions

Use the **My Contributions** tab on the **Work Cases** or **Contribute Retention Info** page to view items that you have contributed to student retention cases. You will not see information that may have been contributed to the same case by others.

About this task

You can use the filters at the top of the page to include or exclude closed cases, cases you own, and case items that are over a year old.

Procedure

1. You can view your contributions to cases on the **My Contributions** tab. From this tab, you can view all of the case items that you have created.
2. To view details about a case item you contributed, click the **View Details** button for that item in the list. The **View My Contributions** page is displayed showing detailed information about the selected case item.
3. To add information about your contribution, scroll down to the Retention Case Follow up section.
4. Enter the following information about the retention case:

- **Summary.** Use this field to enter information that will help the case owner see at a glance what this contribution 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. Enter the summary formatted as: 'Case Category: Personalized Brief Summary'. For example, if you are contributing information about a student M. J. Jones, who has missed too many classes, you might enter this as the summary: *Academic: M. J. Jones has missed 6 sessions of MATH-101-01*.
- **Detailed Notes**. Use this field to enter detailed information about the contribution. For example, if you are contributing information about a student who has missed too many classes, you might enter any special circumstances of which you are aware (such as illness, the student's current grade in the class, participation level, missing tests or assignments), or any other information that might be useful to the case owner.

5. After entering your information, click **Save**. The information will be recorded as a new item on the same case and you will receive a confirmation in the notification center. Click **OK** to dismiss the confirmation and be returned to the **My Contributions** tab.

Contribute Retention Info

Use the **Contribute Retention Information** tab on the **Work Cases** in Self-Service to record any retention-related information about a student. Enter information that would be helpful to someone who will work on that case.

You do not need to know whether a case already exists for a particular student. Retention Alert will record your information as either a new case or as a line item in an existing case.

After you click **Save**, you will receive a confirmation notice in the Self-Service notification center, which includes the case number and the names of the case owners.

If you later want to review the information that you contributed, use the **My Contributions** tab on the **Work Cases** page. From this page, you can view your own contributions and can request additional information from the case owner. Only the case owners can view all information about a case.

Procedure:

1. The Contribute Retention Information workflow begins with a form that allows you to search for a student.
2. To find a student, enter the student's name or ID at the prompt.

Note: The format of the search must be one of the following:

- Person ID
- First Name Last Name (for example, John Smith)
- First Name Middle Name Last Name (for example, John Patrick Smith)
- Last Name, First Name (for example, Smith, John)
- Last Name, First Name Middle Name (for example, Smith, John Patrick)

3. Click the student you want to work with from the search results drop-down list.
4. Enter the following information about the retention case:

- *Type of Issue*. Use this field to select the type that most closely matches the situation you are describing.
- *Summary.* 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 (who may be someone other than you). Enter the summary formatted as: 'Case Category: Personalized Brief Summary'.
- *Detailed Notes*. Use this field to enter detailed information about why you are contributing information for the student.
  - For example, if you are contributing information about a student who has missed too many classes, you might enter any special circumstances of which you are aware (such as illness, the student's current grade in the class, participation level, missing tests or assignments), or any other information that might be useful to the case owner.

5. After entering your information, click **Save** to save your entries. A confirmation will be displayed in the Self-Service notification center and the **Contribute Retention Info** page will be reset and ready to search for another student.

Case Types & Categories

Case Category	*Case Type*	*Priority*
Financial	Financial Pressure/Hardship	Medium
	Insufficient Financial Assistance	Medium
	Other financial (please specify)	Medium
Personal/Confidential	Mental Health	High
	Physical Health	High
	Family Distress	High
	Career goals have changed	Low
	Loss of motivation	Medium
	Other personal (please specify)	Low
	Lack of Communication	Medium
	Life Balance	Medium
	Personal Issues	Medium
	Childcare	Medium
	Family Obligation	Medium
	Family Emergency	High
	Loss of Someone Close to Them	High
	Housing Insecurities	High
	Food Insecurity	High
	Substance Abuse	High
Academic	Program does not meet expectations	Low
	Academic difficulty	Medium
	Poor grades	High
	Not enough academic support	Medium
	Transferring to another college/ university	Low
	Other academic reasons (Please specify)	Low

	Absences	High
	Classroom Behavior	High
	College Readiness	Low
	Cultural Issues	Medium
	Digital Literacy	Low
	Dropping/Withdrawal From Courses	High
	Late Assignments	Medium
	Missing Assignments	Medium
	Stopped Attending	High
	Time Management	Low
Campus Life	Residence life issues	High
	Undergoing rehabilitation for injury	Medium
	Dissatisfaction with the athletic program	Medium
	Unable to continue in the athletic program	Medium
	Sustained an injury	Medium
	Dissatisfaction with the campus environment	High
	Other (please specify)	Low