# Submitting an Early Alert Referral Form

#### **Purpose**

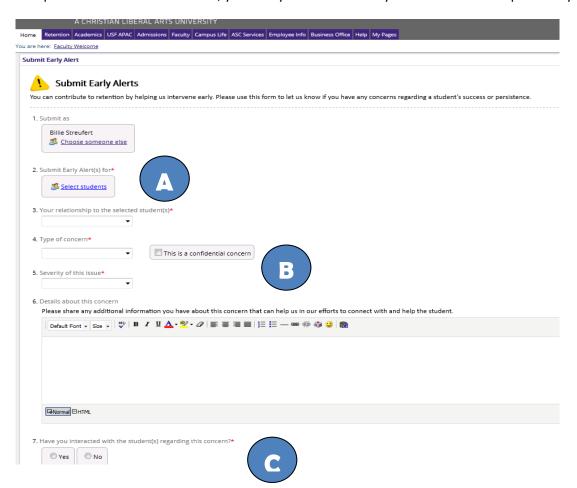
Through this software you are able to share information with the retention team that helps us identify and intervene early. It ensures ongoing and effective communication with every department and all personnel, enhancing departments' collaboration and USF's contact with students. In addition to the information you provide, retention staff are also able to view predictive analytics from static and dynamic data points for diverse factors. This creates a holistic picture that helps us prioritize and deepen our interventions.

Once you submit a concern, Nicole Dulaney or Jessica Carlson identifies the individual who has the most expertise or rapport with the student to follow up and intervene. These personal, non-threatening conversations can occur face-to-face, via email, phone, or WebEx. After emphasizing USF's desire to help the student, staff is able to assess the source of difficulty and develop a success plan. You will receive a follow-up email when the Early Alert is closed.

Institutions that have launched Jenzabar retention software have seen immediate returns on the investments. For example, Carroll University improved first-year retention by five percent and overall retention by four percent, generating more than \$1.3 million in revenue.

#### Overview

You can access the form in My.USF > Retention > Early Alert. The fields in the form help organize concerns to reduce delays and ensure easier processing for retention staff. The form has three parts A) Student Selector, B) Concern Type & Severity, and C) Intervention Section. The Student Selector allows you to select the student(s) you want to add to the alert. The Concern Type and Details permit you to describe your concern, which helps the retention team identify who should follow up. In the Intervention Section, you notify us of the action you have taken in response to your concern.





# STUDENT SELECTOR



#### 1. Your Name

### 2. Submit early alert for

The "Select Students" link opens the Student Selector from which you may add one or more students to the alert. While you have the option to add more than one student to an alert, please do not use this function and submit for only one student per alert.

This part of the form looks different depending on your role at USF. To the left is an example of what the drop down might look like for faculty members who are both an advisor and a course instructor. Faculty may choose from

- Your courses from current and previous terms
- Your advisees
- All Students

Staff may choose from "All Students." This list is filtered to only show active students. Both faculty and staff can scroll to find the appropriate student or use the "Filter List by

Name" box. When you have located it, simply click the "Add-->" button, which moves the name into the "Selected Users" box.

Student Bessette, Eva Burke, Kevin 0 0 Calderon, Walter Cobbs, John 0 Craft, Amy 8 8 8 Elynn, Christopher Hillis, Michael Hockman, Annamarie Jolly, Georgie 8 8 0 Kirk, Roger Koch, Amanda Macon, Corey

Clicking on the student's name or the green "+" icon next to the student will move the student from the left Student Column to the right Selected Students Column. In the example on the left, Christopher Flynn is highlighted for selection.

To remove a student, click on the name or the red "x" icon next to the name. In the example on the right, Sally is highlighted for removal. Removing a

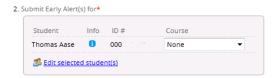


Click students to remove them:

student from this column will add them back to the Students Column so you can select him/her again if needed.

The "Remove All" button allows you to remove all the students listed in the Selected Students Column rather than removing each student individually. Selecting the "OK" button will add the student(s) to the alert. Clicking "Edit selected student(s)" will reopen the Student Selector and you to change your selections.

After you have selected a student, you can identify if your concern applies to a specific course. Simply click on the drop down arrow to view the student's courses. (See the box on the right).



# 3. Your relationship to the selected student(s)

This describes your existing relationship with students. If you have more than one relationship with the student, choose the one that best applies to the concern. For example, if you are students' professor and advisor, select the relationship that best relates to the source of your information and to the setting of any interventions. If the student is not performing well in class, you would select "faculty." You would select "advisor" if students shared something of concern during an individual appointment or conversation.



## **4.** Type of Concern

The retention team invites you to submit concerns for any areas of students' lives. This may include issues related to academic performance, financial aid, selection of a major, employment, emotional, or chronic absenteeism.

This field categorizes your concern, which the retention team uses to identify who has access to it. Students are not notified immediately when you submit the form, but the retention team will share that you requested that we contact them when we follow up and intervene. Students are more receptive to our interventions if they know you are concerned and have a heads-up that we will be contacting them. For this reason, we encourage you to share in advance that you are seeking support for them.

Similar to our existing model, coaches and advisors have access to academic information provided for their respective advisees/athletes. They cannot, however, view any financial or personal concerns that are submitted. Only Nicole Dulaney and other limited staff receive these concerns and can assign follow-up action.

If you have multiple concerns, select the concern type you believe is the most pressing. In the details box described in #6, you can include a comprehensive narrative. Note that athletic teams are only listed to grant access to coaches. Do NOT select these fields.

#### **5.** This is a confidential concern

Similar to the way grades are recorded in LMS, information you provide on this form is also recorded in My.USF. If the retention team requests follow-up action from another staff member, an automatic email is generated, which also includes the details you provide. Students can also formally request to view its contents under FERPA guidelines.

If you mark a concern as confidential, it is not recorded in My.USF. The concern will only be routed to designated staff. My.USF notes that an email was sent, but it does not include any other details. If you submit a confidential concern and staff deem that it is NOT confidential, there is no way to retrieve it and staff will need to re-enter the information into My.USF so a record of it can be recorded. To help you assess if your concern is confidential, please consider the following:

- If you believe a student may be suicidal, please contact Campus Security (321-6400) immediately. Do NOT submit an early alert referral form.
- Route any academic integrity concerns directly to the Dr. Brett Bradfield, Provost and Vice President for Academic Affairs.
- Concerns about eating disorders, alcohol/other drug use, disability accommodations, depression, or other mental health needs should be marked as confidential.
- Concerns about test anxiety, grief, homesickness, or roommate conflict, often do NOT need to be mark as confidential. Although personal in nature, a record in My.USF is beneficial so staff can see the whole picture when they respond to any other future concerns submitted about the student.

QUICK TIP: If you are unsure if something is confidential, select "student-life general" for concern type. This means that only designated staff can view it. We will then assess the nature of the concern and can change it to confidential if necessary. If this occurs, you will be notified via email and the alert is immediately deleted from My.USF.

### **6.** Severity of the issue

By assessing the seriousness of the concern, you help the retention team prioritize and time our interventions. Select "high" if it warrants immediate attention. Also consider the following:

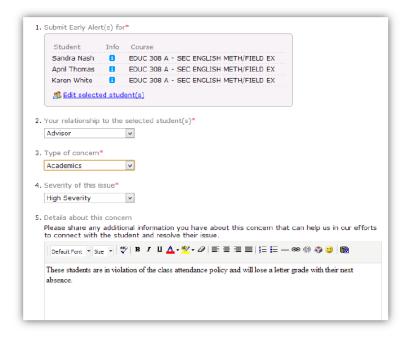
- *High Concerns* Note roommate conflict or beliefs that a student may withdraw immediately as high. Staff will respond ASAP to these concerns. If you have concerns that a student is suicidal, contact Campus Security.
- *Moderate Concerns* We anticipate that the majority of concerns will be moderately severe. This could reflect a sudden change in academic performance or a belief that a student will leave at the end of the term or year.
- Low Concerns If students have definitively decided to leave USF and cannot be persuaded (e.g., USF does not have their major, their boyfriend/girlfriend attends elsewhere, etc.), note the concerned as low in severity. If you would simply like to share information and do not believe an intervention is needed, select low.
- If you are unable to assess the severity, select "unsure."

#### 7. Details about this concern

In this field share the information you have gathered. Remember that this is recorded in My.USF, so provide only factual observations and avoid subjective comments or diagnoses; however, please include as much factual information as needed to adequately address the concern. For example, if you submit an attendance concern, it would be useful to state how many times the student has been absent so that the person following up can have the necessary information to effectively address the issue with the student . You can describe the steps you have already taken to retain the student in a subsequent intervention field.

You should submit a concern individually for each student. If you add multiple students to an alert and then use the Details field to provide more specific observations, it results in confidential information for one student ending up in another student's My.USF record, which could cause a breach of confidentiality. As a result, USF has decided to not utilize the batch Early Alert option.

Here is an example of a form with parts A and B completed.





## **8.** Have you interacted with this student

Whether it is a simple conversation or creating a plan to address an issue, anything you do on behalf of the student is an intervention. Given your rapport with students, it is often beneficial for you to speak with them before you notify the retention team, especially if you are a professor and your concern is academic in nature. We understand, however, that this is not always possible and do not want this to deter you from contacting us. An intervention is encouraged because it helps us know if and how you have already interacted with the student, but it is not required. If you were unable to reach the student, simply select no.

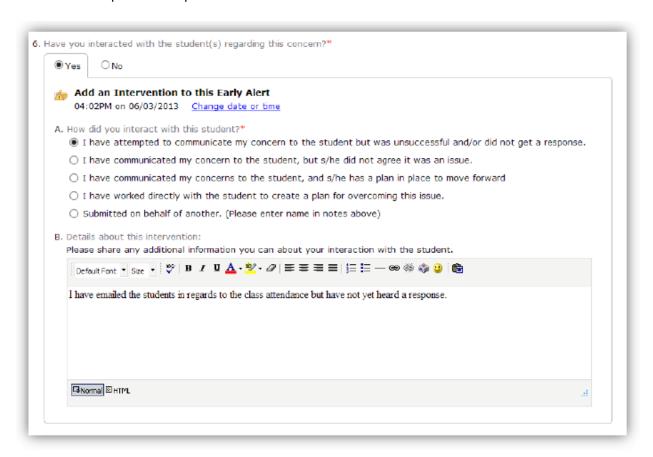
If you select yes to this question, additional fields appear that permit you to

- Describe how you interacted with the student
- Provide details about your own intervention
- Make recommendations to the retention team regarding our follow-up conversations

Select the option in the "How did you interact with the student" that best describes your interaction with the student(s). Remember that this information is recorded in Jenzabar and also included in the automatic email generated for any Follow-up assignments. Therefore, limit your details to factual observations.

If you want to indicate when the conversation occurred, select the "Change Date or Time" link and note the respective date of the intervention.

Here is an example of a completed Interventions section.



# Reviewing an Early Alert

#### **Purpose**

The Early Alert Screen allows you quick access to the details of an Early Alert and all retention actions associated with it that you have permission to view. From the Early Alert Screen, you can

- See student information
- Review details of the Early Alert
- View your Follow-Ups Assignments
- View Interventions you submitted

#### **Navigating to the Early Alert Page**

You access the Early Alert Screen by

- 1. Clicking the link available in a Follow-Up Assignment
- 2. Clicking on the Retention tab in My.USF
- 3. Clicking on a link supplied in notification and/or confirmation emails sent by Jenzabar® Retention

#### **Information Provided**

Once you have located the Early Alert Screen, you can access information that is currently available in the faculty tab of My.USF or CARS. Information has been centralized to prevent you from needing other programs. This includes the following:



- A) Student's contact Information, status, and major The button bar located below the student's name permits you to email the student directly through Jenzabar.
- B) The blue bar in the "Follow-up Assignment" box whether the alert is open or closed. Below this bar you can learn who submitted the concern, as well as the course (if applicable) and severity.

Pay particular attention to the details that the submitted provided. On the bottom of the "Follow-up Assignment" box, recommendations from the retention team are listed.

- C) Remember to click on the "close follow up" button after you have connected with the student and entered an intervention. A reminder will be sent you to within five calendar days if it is not closed.
- D) Select the "Add an Intervention" button to describe any action you took in response to the concern. The same questions will appear that the original submitter viewed and



responded to. Describe how you interacted with the student, noting his or her response. Then provide any further observations or facts that could be valuable to the retention team. You can change the date of the intervention to record the time of the original conversation if needed.