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 Search

Alerts



Help Center Manager

1 month ago · Updated

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What: Alerts are a way to draw attention to a student who might be at risk for a variety of reasons, such as losing financial aid, needing tutoring, or intending to withdraw from the institution.

Where: Alerts can be issued throughout the platform, including your staff or professor homepage, a student's profile page, the **Advanced Search**, and through **Progress Reports**. Alerts are viewed primarily on the student's **profile page**, **Professor Home**, and in the **Reporting** section of the platform.

Who: Alerts provide **staff** and **faculty** with the ability to draw attention to students or prompt a referral with another department using the platform.

Conditions: The ability to create and view Alerts is permission-based by user role. Alerts are not managed at the Care Unit level – if you can view alerts, you can view all alerts for student profiles in which you have access. Alerts are a feature within **Strategic Care**.

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Feature Overview

With the proper permissions, staff or faculty can issue an alert on a student at any time. Alerts are a way to draw attention to a student who might be at risk for a variety of reasons, such as losing financial aid, needing tutoring, or intending to withdraw from the institution. Issuing an alert can draw attention to these students, create a virtual referral, and prompt action from another department. Access to alerts is based on your user role permissions. Contact your Application Administrator if you have questions about your permissions and viewing alerts.

Issuing an Alert

You can issue an alert for a student two different ways in Navigate; ad hoc or through a Progress Report Campaign.



Issuing Alerts

03:17

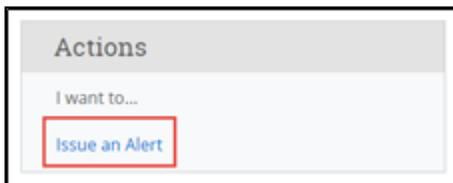


Ad Hoc

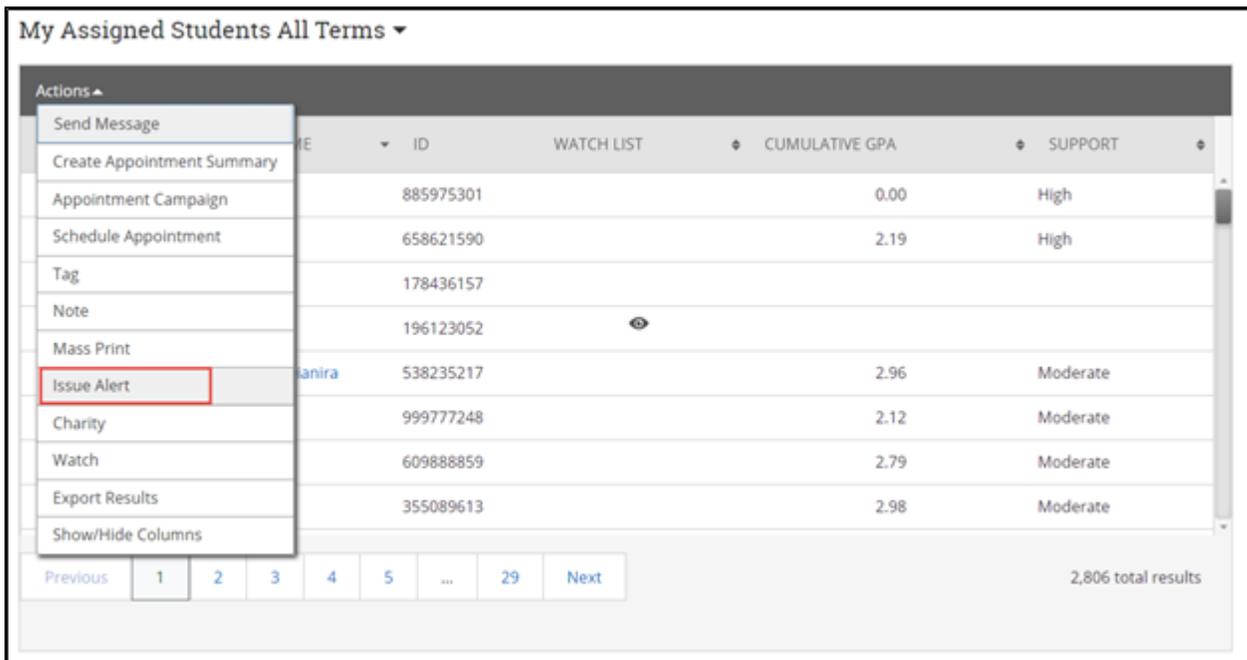
There are several locations to issue ad hoc alerts in Navigate. They include the **Staff Home** or **Professor Home** pages, in **Advanced Search** results, or from a student profile.

To issue an alert from **Staff Home** or **Professor Home**, select **Issue an Alert** from the **Actions** pane. A dialog then prompts you to search for the student you want to issue the alert for, as in the following

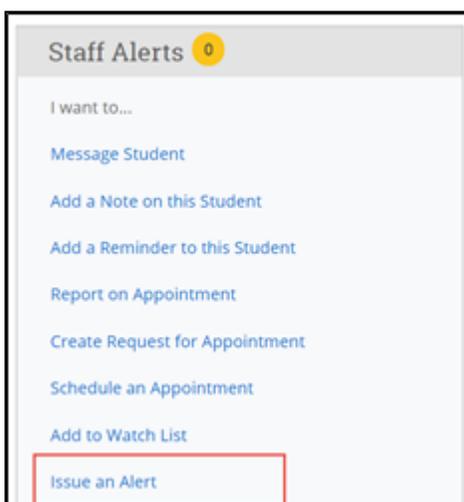
screenshot.



To issue an alert from a list of students, such as **Advanced Search** results or your **My Assigned Students** pane on your home page, select a student from the list. Next, select **Actions > Issue Alert**.



To issue an alert from a student profile, select **Issue an Alert** from the **Action** pane as in the following screenshot.



Selecting **Issue an Alert** opens the **Alerts** dialog. Text boxes in the dialog are in the list that follows the screenshot.

ISSUE AN ALERT ✕

Student Terrence Abernathy

Please select a reason for this alert

Select at least one

Is this alert associated with a specific class? Optional ▼

Additional Comments

Please enter a comment.

Cancel
Submit

- **Alert Reason:** Select at least one reason for issuing this alert. Alert reasons are configured by your institution. Contact your Application Administrator if you have questions about your institution's alert reasons.

Important. Alert reasons are tied to Care Units. If your institution uses case management workflow, each alert reason chosen opens a separate case for the student.

- **Association with Specific Course (Optional):** Select a course from the list if the alert is associated with a specific course the student is currently enrolled in.
- **Additional Comments:** Enter comments in this box. Staff and faculty with permission can view the alert and its comments. There is no character limit to this field.

If your institution has set up this feature, issuing an alert might open a case. Contact your Application Administrator if you're unsure if your institution uses that feature. To learn more about cases, read the [Cases article](#).

Important. Any information you enter into Navigate pertaining to a student becomes part of their official student record. It may be subpoenaed by the student as outlined in the Family Education Rights and Privacy Act (FERPA).

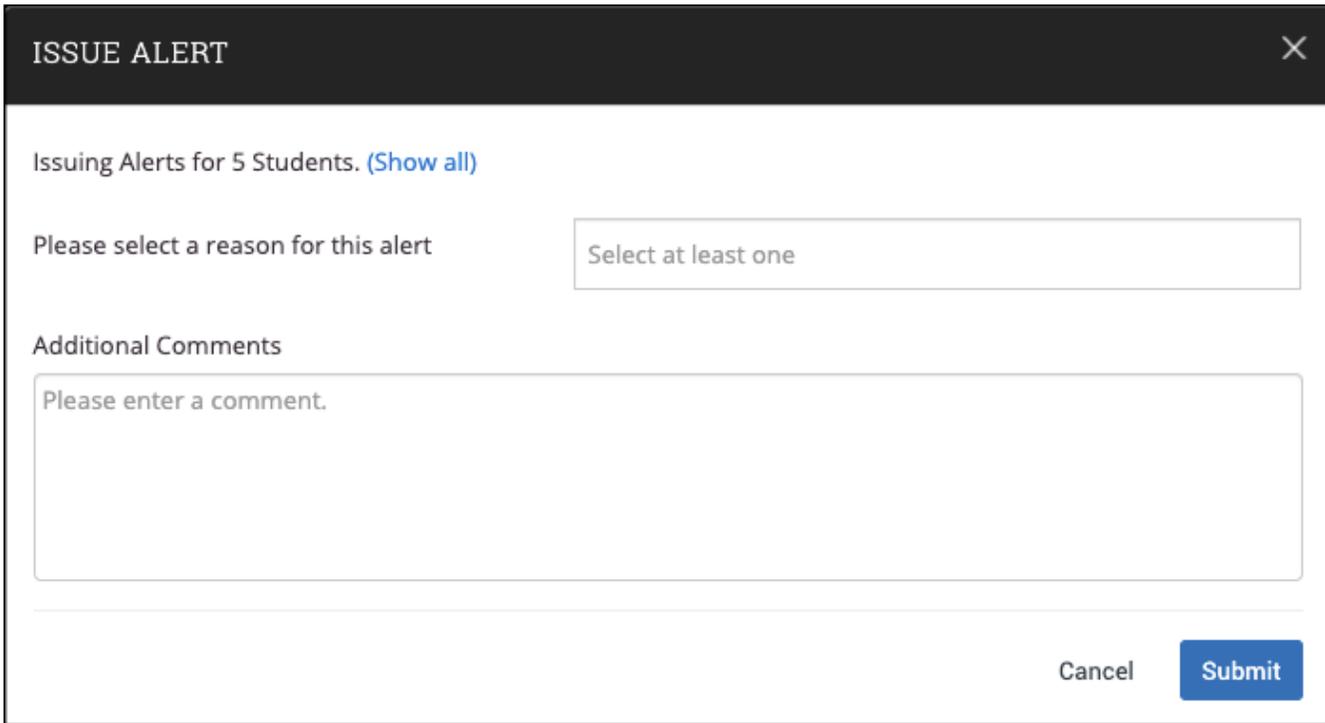
Progress Reports

Faculty can also issue alerts through Progress Reports, which are requests for updates on student progress in a specific course. To learn more about Progress Reports, check out this [article](#).

Issuing Mass Alerts

Navigate lets users issue mass alerts for up to 100 students at a time. The alerts generate one alert per student. This is available in **Advanced Search**, [Staff Home \(My Students\)](#), new Standard Reports, and other drop-down menus where you are able to issue a single alert from the **Actions** menu.

If multiple students are selected, the dialog is similar to the one for issuing a single alert. There are two main differences. First, you see **Issuing Alert for X Students** with a link to show a list of all the students. The other difference is there should be no course selection drop-down.



ISSUE ALERT

Issuing Alerts for 5 Students. [\(Show all\)](#)

Please select a reason for this alert

Additional Comments

Please enter a comment.

Cancel

Note. If you click **Show All** and you no longer want to see all students, you can click **Collapse All** to hide the list.

Alert Notifications

Depending on your institution's configurations, the assigned advisor and/or student may receive notifications about the alert. Your institution may choose to send both, one, or neither of these notification emails, configured for each alert reason. If you have questions about what notification emails are being sent for your institution's alert reasons, contact your Application Administrator.

Student Notification

If a staff or faculty member issues an alert on a student and the selected alert has been configured to send student emails, the student receives the following message from the platform notifying them that an alert has been issued. This message is simply an example and may look different for your institution. If you would like to learn more about how to configure this message for your institution, [please read this article](#).

The screenshot shows an email notification from EAB. The sender is **no-reply@gradesfirst.com** (to me). The subject is **Hi Austin Adams**. The main body of the email reads: "You have a new notification issued by William Sogegian for Hydrology, for the following reason(s):
Late Assignments
Dear Student,
A staff member has indicated that you have the following issue to resolve. Please look at this at your earliest convenience."
The notification was issued on 02/26/2020 03:25 PM. For more information, please contact your Assigned Staff: [Ann Cottle](#), [Patrick Duffy](#), [John Rodriguez](#), [Dave Spencer](#), [Lucille Creekmur](#), [Robert Dickson](#), [William Sogegian](#). The EAB logo and NAVIGATE logo are visible at the bottom.

Callout 1: The email will be sent from a no-reply email address from the system (pointing to the sender address).

Callout 2: If the alert has been configured in Alert Reasons to 'show the reason', the alert type will be included here. If text has been included in the alert setting, it will be included as well (pointing to the 'Late Assignments' reason).

Assigned Staff Notification

If a staff or faculty member issues an alert on a student and the selected alert reason has been configured to send assigned staff emails, staff assigned to the student who have been selected to receive notifications for the alert reason receives the following message from the platform notifying them of the issued alert. This message is simply an example and may look different for your institution.

The email will be sent from a 'no-reply' email address automated from the system.

The message will indicate the an alert has been issued on one of the advisor's students.

Next, additional information pertaining to the alert, including associated courses and comments, will be noted in the message.

[Student Notified] Lenora Grivas Inbox

no-reply@gradesfirst.com
to me

EAB

A user has submitted an alert on one of your students.

Details are included below.

Name of Student:
Lenora Grivas

Advisors:
Rich Staley, Kelli Keener, Ashley Liberio, Erin McDougal, Elizabeth Guertin, Peter Haverkos, Seth Moucka, John Eagan

Categories:
Swimming, Ultimate Frisbee

Majors:
Biological Science

Enrollments:
MOLECULAR CELL BIOLOGY

Alert reasons:
Needs Tutoring

Comments:
Student struggling with early course concepts.

Alert Created By:
Steven Kilpatrick on 04/28/2017 12:49 PM.

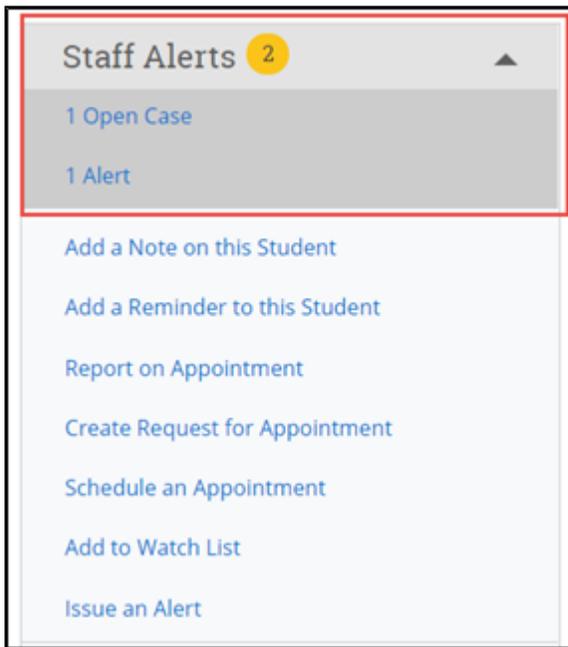
Viewing Alerts

There are three ways to view issued alerts on a student through the Navigate platform – the student profile, the professor home page or reports.

Important. You cannot view alerts you have issued from your **Staff Home** page.

Student Profile

To view alerts on the student profile, navigate to that student. On the right side of the profile, the total number of staff alerts for that student is listed at the top right. This count includes all Alerts, Cases, and Progress Reports issued for the student. Based on your institution's configurations, this count may include *all issued alerts* in the platform, or it may only include *alerts issued in the current term*. Contact your Application Administrator if you have questions about your institution's configuration for this count.



Important. Because the total count includes all Alerts, Cases, and Progress Reports, you may find duplicate information. For example, if one Progress Report issues one Alert, which in turn opens a Case, the total count will be three to include each of those actions, even though they all originated from the same Progress Report. Be mindful of what the total count means when using that information to inform student interactions or follow up.

To view additional information about the issued alerts, either click directly on the “1 Alert” hyperlink from the total count or navigate to the “History” or “Reports/Notes” tab of the student profile. Whether you can access the History or Reports/Notes tab depends on your institution’s configurations. To learn more about this tab, check out this [article](#).

On this tab, you can view all alerts issued for the student, either in the Alerts section or within the History feed. Please see the screenshots below.

In the Alerts section:

Alerts For Joie ▾					
ALERT REASONS	ISSUED ON	ISSUED BY	COMMENTS	ASSOCIATED CASE	ISSUING EVALUATION
Needs Peer Mentoring	11/14/2018	Erin McDougal	Joie is not feeling connected to campus. I recommend she seek out Peer Mentoring.	Manage Case	Not Applicable

In the History Feed:

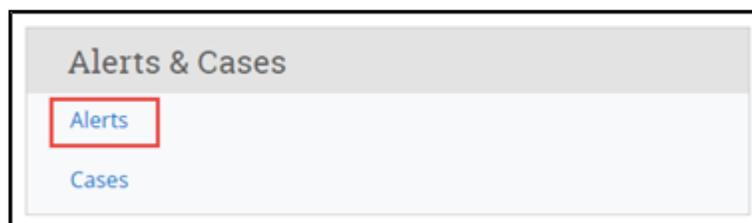
Important. If you are viewing the History feed but would instead like to view all Alerts together, select the dropdown menu at the top of the History feed, and choose **Alerts for [Student's Name]**. This only shows the Alerts section view.

Information provided in the Alerts section includes:

- **Alert Reasons:** All reasons associated with this alert.
- **Issued On:** Date in which the alert was issued.
- **Issued By:** Who issued the alert.
- **Comments:** Any comments originally entered when the alert was issued.
- **Associated Case:** If the alert was configured to automatically open a case, or a case was manually opened, a link to the case displays here. Information available in the case dialogue box includes the case owner, case assignee, and case activity. You may or may not have permission to view or manage the case. To learn more about cases, check out this [article](#).
- **Issuing Evaluation:** If the alert was issued through a Progress Report, then additional information is available here, including the course, if the student is at risk to fail the course, absences, current grade, and professor comments. You may or may not have permission to view the Progress Report details and the information included within may differ based on your institution's specific configurations.

Reporting

To view information about alerts for several students at once, navigate to the **Reports** page. Based on your permissions, you may be able to view the **Alerts** report, located in the Alerts & Cases report section.



In the Alerts report, you can search by keyword, enrollment status, enrollment term, begin date, end date, alert reasons, case issuers, and other filters available in the Advanced Search.

	STUDENT ID	STUDENT NAME	MAJORS	ALERT REASONS	CREATED AT	ISSUED BY	ASSOCIATED COURSES	TAGS
1.	467155408	Aaberg, Annette	Communication	Low test scores	11/12/2018	White, LaToya	TOPICS IN MODERN PHILOSOPHY	test tag
2.	610832550	Aavang, Marnie	Political Science	Needs Peer Mentoring	11/12/2018	White, LaToya	TOPICS IN MODERN PHILOSOPHY	Attended Orientation, FAISA HOLD, test tag
3.	063397350	Johnson, David	Music	Attendance Concerns, Classroom Concerns, Failed Midterm	11/13/2018	White, LaToya	TOPICS IN MODERN PHILOSOPHY	Attended Kickoff Experience, Attended Orientation, FAISA HOLD, online student

The report includes the following information: student ID, student name, majors, alert reasons, created at, issued by, associated courses, and tags.

The report allows for the following actions from the dropdown menu: send a message, tag, create appointment campaign, show/hide columns, and export to excel.

To learn more about the reports available in the platform, check out this [article](#).

Professor Home

Issued alerts show on the Professor Home in the **My Issued Alerts** section. This allows faculty to see alerts they have issued in Navigate, including links to any associated Progress Reports or Cases.

Issued Alerts ▾						
Actions ▾						
<input type="checkbox"/>	STUDENT NAME	REASON	SUBMITTED	OWNER	STATUS	
<input type="checkbox"/>	Derek Watkins	FAFSA	06/09/2018	Adam Ferguson	Closed	
<input type="checkbox"/>	Ida Goodman	Tutoring	06/16/2018	Lily Bass	Open	
<input type="checkbox"/>	Jacob Richards	Financial Advice	09/06/2018	Alfred Daniels	Closed	
<input type="checkbox"/>	Mattie McGee	General Advising	04/15/2018	Alex Bennett	In Progress	
<input type="checkbox"/>	Lina Horton	Financial Advice	05/29/2018	Alta Greene	Closed	

Issued Alerts include the date the alert was issued, the student's name, the reasons for the alert, if a case was opened, and if the alert was attached to a Progress Report.

If a case has been opened, faculty can click the case and see a window that explains which alert reasons opened the case, the status of each case, and the case outcome if the case has been closed.

CASE INFO ✕

Alert For Rodriguez, Ashley
Issued on 06/05/2019 @ 10:51 am

The following cases were opened as a result of this alert.

Alert Reasons	Status	Case Outcome
Disruptive in Class	Case Open	

If the alert is linked to a Progress Report, the faculty member can open the report.

Frequently Asked Questions

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 are 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.

Who can issue alerts?

Any user with the appropriate permission can issue alerts. This is often faculty, users with advisor roles, financial aid users, and others.

What are alert reasons?

Alert Reasons are individually created reasons for a student to be considered potentially at-risk or serve as a referral to other support services. Some possible alert reasons include Financial Aid, Low Test Score, Low Attendance, Failed Midterm, Needs Tutoring, and others. They are configured by administrators in the Alert Reasons section of Navigate. The administrators determine whether the alert reasons apply to both general alerts and progress reports or just one of these features.

Who is notified when an alert is issued for a student profile?

It depends on the alert reason. When creating alert reasons, the institution can choose whether the student's advisor and/or the student should be notified. However, if the alert is tied to an alert reason that is connected to a different service – e.g. financial aid – your institution may have existing rules for who is notified, such as a financial aid representative.

What email notifications do I receive for progress report alerts vs. ad hoc alerts?

There are configuration options to allow students and/or advisors to receive an email when an at-risk progress report is issued. The student email is configurable.

For ad hoc alerts, email notifications depend on the alert reason settings and the case management settings. If the alert reason is configured to send an email to the advisor, the advisor receives an email when the alert is issued. If the alert reason automatically creates a case, the person the case is assigned to also receives an email notification.

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?

Alerts can only be deleted in two situations: if a case associated with the alert is deleted, the relevant alert is deleted. Alerts can also be deleted through the Alerts report.

Can we import alerts from other systems on campus to display on the student's profile?

We do not offer any inbound alert APIs at this time, but this may be possible through our alerts import file. If you would like to explore this option, please contact your Strategic Leader.

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

The alert remains on the profile, but the course is no longer associated.

Related Articles

- [Strategic Care – Cases](#)
- [Strategic Care – Progress Report Campaigns](#)
- [Strategic Care – Student Profile: Reports/Notes or History Tab](#)
- [Strategic Care – Reporting](#)
- [Alerts & Cases Administration](#)
- [Coordinating End to End Early Alerts](#)
- [Identifying & Intervening with At-Risk Students](#)

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Was this article helpful?

Yes

No

6 out of 7 found this helpful

Still have questions after reading this article? Check out our [Community](#) where you can discuss Navigate functionality and best practices with both others users and EAB staff!

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Comments

10 comments

Sort by 



Naomi Nash

It would be great to see some traction on making "Issue an Alert" customized per institution, the way the Predictive Risk Score and, recently, the Important Information have been customized. At the University of Delaware, the terminology of "Alert" has always been a concern because of our internal alert system, which denotes a serious concern/crime on-campus. We have generally built the ad hoc Alert/Case system as a referral network and would like to customize ours to say "Issue a Referral" and have spoken with several other institutions who also wish that language either didn't say Alert or could be individualized per institution. Or, we've even heard that "Academic Alert" would be better than the current verbiage. Even with the best of training efforts, it is hard to convince users to click a link when they otherwise associate the wording of "Alert" to mean something so concerning. The recent change of "Watch List" to "Student List" leads me to believe that you're considering the impact of language and I'm hopeful you'll consider "Issue an Alert" next. Thank you!



Dominic Stellini



Is there a way for an advisor to see a list of all of their advisees about whom an alert has been issued? (Assume that the advisor does not have access to run reports.) I do not see alerts as an option on advanced search.

Thanks



Help Center Manager



Naomi,

Thank you for your comment regarding the alert language! I appreciate your detailed feedback and will pass this along to our product team!

Dominic,

Thanks for your question! Unless the advisor has access to run reports, there is unfortunately not an easy way to pull this information. The advisor could ask a site administrator (with reports permissions) to pull a list of their students who have an alert, then the advisor could create a saved student list of those students to see them all in one place. Then, to view alerts on each student, the advisor could open the student profile of each individual. On the right side of the profile, the total number of staff alerts for that student is listed at the top right. This count includes all Alerts, Cases, and Progress Reports issued for the student. Based on your institution's configurations, this count may include *all issued alerts* in the platform, or it may only include *alerts issued in the current term*. Please contact your Application Administrator if you have questions about your institution's configuration for this count.

Best,

Jessie (Community Manager)



Help Center Manager



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Dominic Stellini,

One more note: if the advisor has the site administrator send them a list of students, and that list includes any FERPA protected information, then the administrator should not email the list, but rather should place it in a secure location where the advisor can access it.



Best,

Jessie (Community Manager)



Todd Blankenbeckler



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Our institution used D2L Brightspace for its LMS. Brightspace has the ability to process emails via its Intelligent Agents system. It would be nice to have intelligent agent emails that are based on key reasons for alerts to be able to generate an alert in Navigate. Unfortunately, there is no mechanism for processing an email into Navigate to generate an alert.



Help Center Manager



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Hi Todd,

Interesting idea! I can certainly see where that feature could be helpful. Thanks for sharing your feedback and I will pass it along to our product management team for consideration.



Best,

Erin



Ashley Land



0



Hello,

We are wondering if its possible to include a link to student alerts in this section of the appointment center and when clicked on a pop-up box with the students active alerts would appear?



Scheduling Grid ▼ ⓘ

Date: Start Time (PT): End Time (PT):



Bonnie Sullivan



Hi Ashely,

Thank you for your question! Unfortunately, the links in that box are not customizable at this time. If users have the correct permissions, they'll be able to see alerts on a student's page.



Take care,

Bonnie (Partner Support Team)



Ashley Land



Hi Bonnie,

Thank you for the feedback. Is there a way to request this feature? We are trying to brainstorm ideas regarding students who check-in/schedule appointments but should be monitored for



concerns. To visit the student profile from the appointment center to view alerts is not an effective workflow and creates delays when trying to make appointments during busy times. Do you know if other schools do something similar for concerns? if so, what is their workflow?

Thank you!



Bonnie Sullivan



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Hi Ashley,

Of course! I am happy to put in an enhancement request for that functionality. In terms of recommendations for that particular workflow -- I would suggest posting in the new Community space to see if any of our other partners have recommendations for ease of viewing alerts while scheduling appointments. The Navigate Best Practices group can be found here:

<https://networking.eab.com/main/groups/43505/lounge> , and is used for partners to share best practice recommendations around questions like yours.

Best,

Bonnie (Partner Support Team)



Help Center