



Standard Operating Procedure – CRM Advise Early Alert

Responsibility: Student Services Advisors, Counselors, and other members of Tartar Success Teams.

Time frame: Faculty can submit early alerts throughout the academic year, but early alerts should be submitted in week four and in week nine during a semester for timely support.

Definition: Early alerts allow faculty members to be proactive, supportive, and involved in facilitating the academic components of student retention through early detection and intervention of students. The information is shared with Student Services Advisors, Counselors, and members of Tartar Success Teams. They work with students individually and assist in overcoming any barrier to college success and making appropriate referrals to campus resources.

Procedures:

Step 1: Faculty will initiate tracking items, flags and/or kudos.

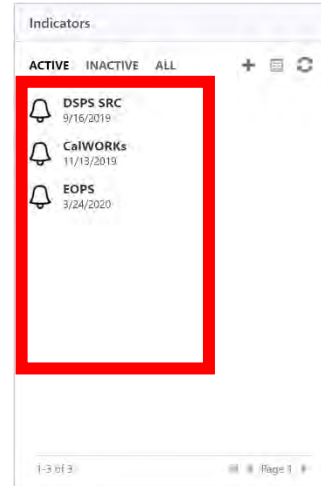
Early Alerts	Risk Status
Attendance	
Missed 2 or more classes/frequent tardies	High
Student Services Resources	
External Factors Affecting Performance	High
Technology	High
Academic Performance	
Progress Report – Progress grade C	High
Progress Report – Progress grade D or below	High
Poor test performance/missed exam or quiz	Medium
Incomplete or missing assignments	Mediums
Referral	
Personal and Academic Counseling	Medium
Tutoring	Medium
Academic Achievement	
Progress Report – Progress grade A or B	Low – automatically closed
Student engaged	Low – automatically closed
Student improving in class	Low – automatically closed

Step 2: All faculty-initiated alerts will receive automated emails and text messages.

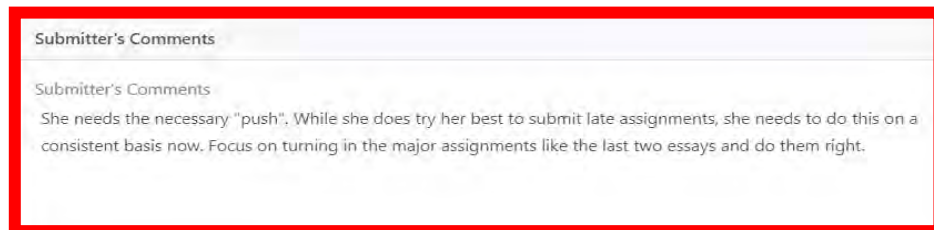


Step 3: The CRM Advise lead check early alerts for indicators and assign them to the appropriate Student Services Advisor, in order of priority:

1. Special Resource Center
2. CalWORKs
3. EOPS/CARE
4. Athlete
5. FIST
6. Guardian Scholars Program
7. (Add HS Indicators)



Step 4: Student Services Advisors, Counselors, and members of the TST review the “Submitter’s Comments” and the Inreach Intervention (see attachment) plan before contacting students:





Early Alert Communication Grid	
<ul style="list-style-type: none"> High Risk Medium Risk 	Automated email & text message sent via CRM Advise Automated email & text message sent via CRM Advise
A. High risk (Phone # Available) – Students will be contacted via phone. Student contact will be initiated within 48 hours and the goal will be to close early alert within 7 days.	<u>Attempt #1</u> – call student within 2 business days from receipt of alert. <u>Attempt #2</u> – text student within 5 business days from receipt of alert <u>Attempt #3</u> – email student within 7 business days from receipt of alert. *MARK COMPLETE: <i>Next business day</i> from last attempt*
B. High risk (NO Phone # Available) – Students will be contacted via phone. Student contact will be initiated within 48 hours and the goal will be to close early alert within 7 days.	<u>Attempt #1</u> – Look up phone number in Banner within 2 business days from receipt of alert. (SPAIDEN) a. w/phone # – call student if phone number is in Banner within 2 business days from receipt of alert. b. w/out phone # – email student phone number form within 2 business days from receipt of alert. <u>Attempt #2</u> a. text student within 5 business days from receipt b. email student following up on phone number form within 5 business days from receipt <u>Attempt #3</u> – email student within 7 business days from receipt of alert. *MARK COMPLETE: <i>Next business day</i> from last attempt*
A. Medium risk (Phone # Available) – Students will be contacted two times each via phone. Student contact will be initiated within 48 hours and the goal will be to close early alert within 7 days.	<u>Attempt #1</u> – call student within 2 business days from receipt of alert. <u>Attempt #2</u> – text student within 5 business days from receipt of alert <u>Attempt #3</u> – email student within 7 business days from receipt of alert. *MARK COMPLETE: <i>Next business day</i> from last attempt*
B. Medium risk (NO Phone # Available) – Students will be contacted two times each via phone. Student contact will be initiated within 48 hours and the goal will be to close early alert within 7 days.	<u>Attempt #1</u> – Look up phone number in Banner within 2 business days from receipt of alert. a. w/phone # – call student if phone number is in Banner within 2 business days from receipt of alert. b. w/out phone # – email student phone number form within 2 business days from receipt of alert. <u>Attempt #2</u> a. text student within 5 business days from receipt b. email student following up on phone number form within 5 business days from receipt <u>Attempt #3</u> – email student within 7 business days from receipt of alert. *MARK COMPLETE: <i>Next business day</i> from last attempt*
A. Low risk – Students will receive an automated email and text. Students will not be personally contacted.	Automatic Message sent via CRM Advise

***Add Notes in CRM Advise for each attempt:**

Notes are an important piece to our Early Alert intervention. It is important to be objective, thorough and concise



in note taking after each and every attempt to reach the student. Add your initials at the end of each note.

Example:

Attempt#1: 1/1/2023

Advisor called student at 4:35pm and left a voicemail message. -SA

Attempt#1: 1/3/2023

Advisor spoke with student over the phone and addressed the early alert concern for English 101 with the student. Student stated that this class has been difficult and would like to receive additional support. Advisor provided the student with the tutoring schedule via email. Student will make an appointment to meet with a tutor next week to review MLA style formatting. -SA

Attempt#1: 1/4/2023

Student does not have a phone number in CRM Advise. Advisor looked up phone number in Banner. No phone number available. Advisor emailed phone number form to student. - SA

Step 5: Student Services Advisors, Counselors, and members of the TST contact students

Step 6: Review phone scripts and resources accordingly.

Phone/Voicemail Script
Hi _____, My name is Cesar Jimenez, I'm your Student Services Advisor in the STEM Guided Pathway Division. How are you? I'm reaching out to you because your instructor has noticed your incomplete and/or missing assignments. The purpose of Early Alert is to inform you of this concern early in the semester so that support systems can be sought out and implemented. [Provide student with the appropriate resources/next steps outlined in the Inreach & Intervention plan, including schedule counseling appointment]. – provide an empathetic conversation



Step 7: Fill in the Alert Attempts and Basic Needs information and hit SAVE.

Alert Attempts

Attempt #1	Attempt #2	Attempt #3
Attempt #1 *	Attempt #2 *	Attempt #3 *
Attempt #1 Notes *	Attempt #2 Notes *	Attempt #3 Notes *

Basic Needs

Laptop *	Headset *
WiFi Hotspot *	Cellfresh *

Step 8: Alert Status

Overall Alert Status

Overall Alert Status *

Step 9: Hit SAVE and MARK COMPLETE once all phone attempts are completed.

ellucian | Advisors | Alerts | Missed 2 or more classes/frequent tardies

HELP | SAVE | MARK COMPLETE | SAVE & CLOSE | SAVE & NEW | DELETE | CLOSE ALERT | TO CASE | ADD TO QUEUE

Alert: Missed 2 or more classes/frequent tardies

Owner: Wright, Lakeisha

Created By: Cruz, Alma

NOTES

Enter a note

Attempt #1
Left student a vmail and email-LW
You - Just now

Activities

Email Messages



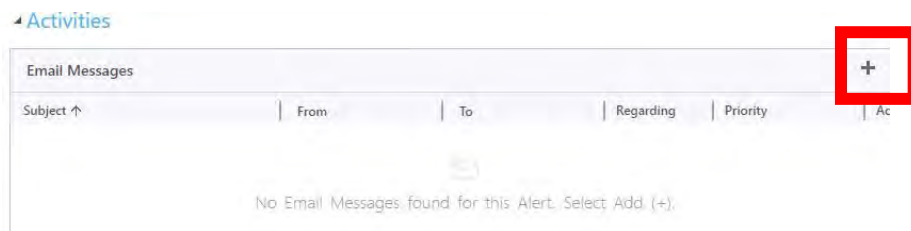
Appendix

A. Email

Step 1: Follow-up with student via email and interventions (including scheduling appointments)

I. Send Email via CRM Advise

- a. Open the alert and under activities click the “+” sign next to “Email Messages”. A pop-up window will appear to input the email.



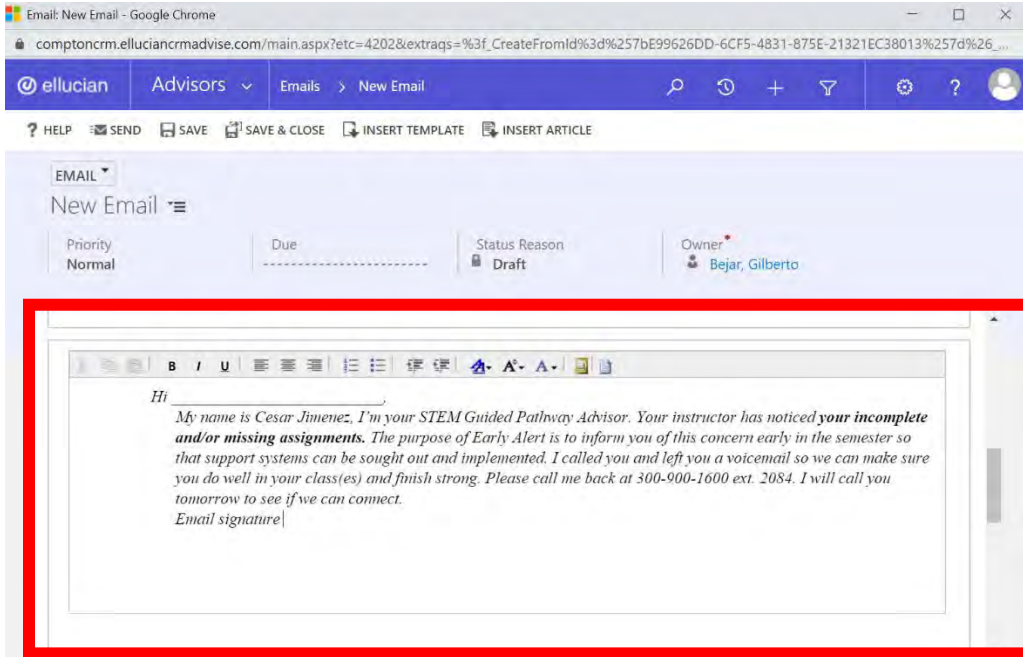
b. Manually fill-in information i.e. “To, Subject, and From”

The screenshot shows the 'New Email' form in the CRM Advise system. The form is titled 'New Email' and has a dropdown menu for 'EMAIL'. Below the title, there are fields for 'Priority' (Normal), 'Due' (empty), 'Status Reason' (Draft), and 'Owner' (Bejar, Gilberto). The main input area is highlighted with a red box and contains the following fields:

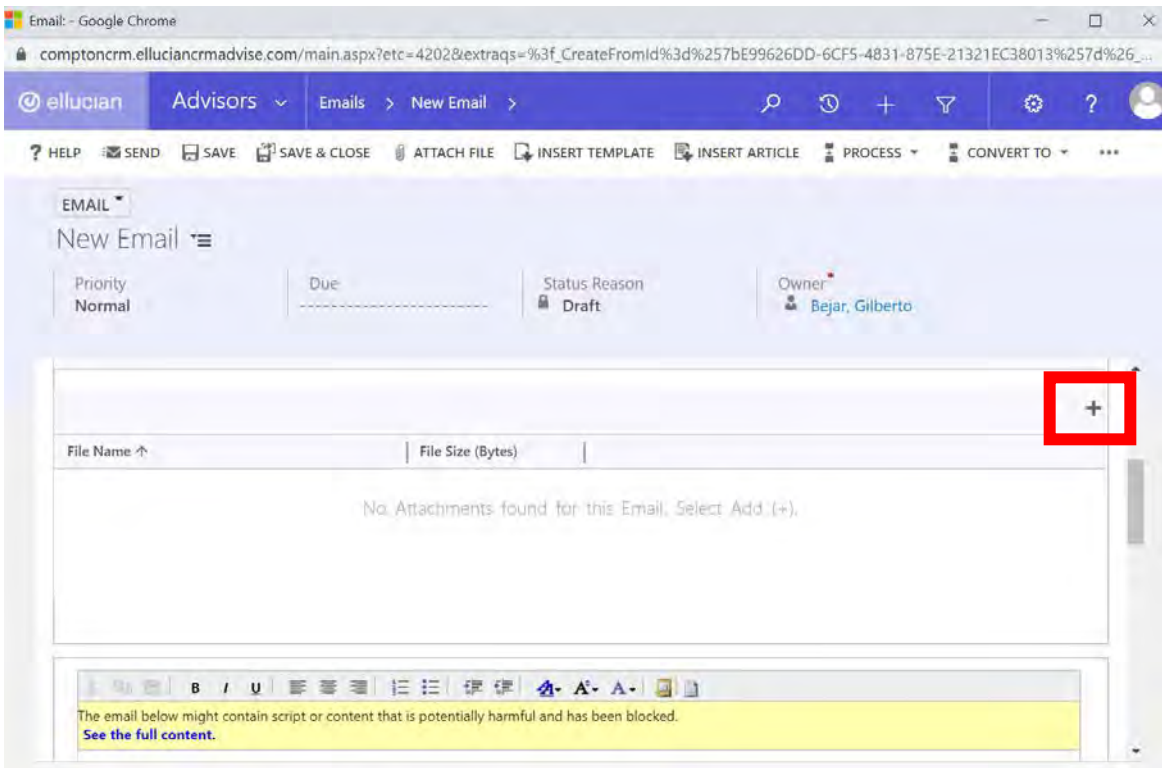
- From
- To
- Cc
- Bcc
- Subject
- Activity Code

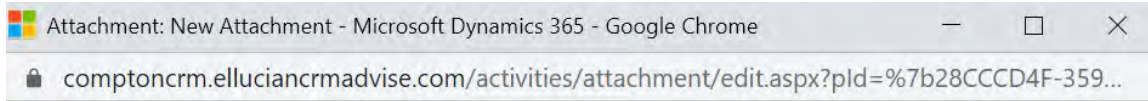
Below these fields is an 'Attachments' section. At the bottom of the form, there is an 'Activity Status' field set to 'Draft'.

- c. Paste the body of your email message below



- d. Hit “SEND” if no attachment is needed. To add an attachment, see step “I.e”
- e. Click “SAVE”, scroll up, and click the “+” to add attachment





Manage Attachment

Choose a file to attach.

File Name:

Choose File

No file chosen

Attach

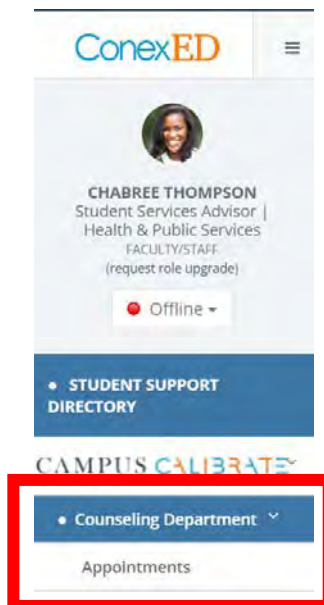
Close

- f. Close, then when email is complete click “SEND”

B. Scheduling Appointments

Step 1. Schedule Appointments via Cranium Café

- a. Click the Menu Bar, select Campus Calibrate, select Counseling Department/In-Person Enrollment Services, and select Appointments



- b. The counselors schedule will appear



Calendar Student Lookup Reports

Calendar Settings Fri - May 15, 2020 < > today Check-in & Details Week Day

	Carlos Maruri	Cheryl D Threadgill	David Turcotte	Desiree Ramirez	Essie French Preston	Melain McIntosh	Noemi Monterroso	Raquel Michel Jackson	Rosa Carrillo	Shay Brown	Theresa Barragan-Echeverria
7:00 am											
7:30 am											
8:00 am			8:00 - 9:00 Busy	8:00 - 9:00 Busy			8:00 - 9:00 Busy	8:00 - 9:00 Busy		8:00 - 9:00 Busy	
8:30 am											

- c. Once a counselor and available time slot is found (light gray area only) select the desired time and an “Event Creation” window will appear. Select “Create Appointment”

Event Creation

Staff Member: Essie French Preston

When: May 15th, 2020
8:00 AM - 9:00 AM

What kind of event would you like to make?

- d. After you select create appointment the detailed window will appear. Complete with appropriate student information. Be sure to add details in the meeting subject



line. Once complete, select create appointment and the appointment will be confirmed.

Create Appointment

Staff Member:

Essie French Preston

When:

May 15th, 2020
8:00 AM - 9:00 AM

Attendee:

Add New Student

Start:

8

00

am

End:

9

00

am

Reason Codes:

☐

Academic Progress (60 minutes)

☐

Career Counseling (60 minutes)☐☐☐☐☐☐☐☐☐

Meeting Location:

☐ Video

☐ Telephone

Meeting Subject:

Create Appointment

Cancel



C. Inreach and Intervention Grid

Alert Type	Intervention Pathway	Student Resources
Attendance		
Missed 2 or more classes/frequent tardies (high)	Discuss number of absences or punctuality issues, including time management, and issues that impact tardiness. Review class expectations with student. Schedule counseling appointment if applicable.	<ul style="list-style-type: none"> ✓ Discuss withdrawals from course(s) ✓ Compton College Resources Application: Assistance with Wi-Fi hotspot, laptop loan, food, and housing insecurities ✓ Refer to Library Student Success ✓ Center for Workshops
Student Services Resources		
External factors affecting performance (high)	Meet with student to discuss non- academic concerns, i.e. Everytable meal services, shelter/parking, CalFresh, health services, etc. Schedule counseling appointment if applicable.	<ul style="list-style-type: none"> ✓ Compton College Resources Application: Assistance with Wi-Fi hotspot, laptop loan, food, and housing insecurities. ✓ CalFresh: CalFresh is California's food stamps (SNAP) program. Students can apply to get up to \$194 a month per household member on an EBT card. The DPSS Customer Service Center can be reached at (866) 613-3777. ✓ Food Bank Resource Guide ✓ Health Services ✓ AB 540 and Undocumented Student Resources
Technology Issues (high)	Share student resources, i.e. laptop loan program, Wi-Fi hot spot, headsets, etc.	<ul style="list-style-type: none"> ✓ Compton College Resources Application: Assistance with Wi-Fi hotspot, laptop loan, food, and housing insecurities.



Academic Performance

Progress Report – Progress grade C (high)	<p>Discuss number of absences or punctuality issues, including time management, and issues that impact tardiness. Review class expectations with student. Offer scheduling an appointment to the student to meet with a Counselor.</p>	<ul style="list-style-type: none"> ✓ Discuss withdrawals from course(s) ✓ Compton College Resources Application: Assistance with Wi-Fi hotspot, laptop loan, food, and housing insecurities. ✓ Refer to Library Student Success Center for Workshops ✓ Refer to Tutoring ✓ Counseling Appointments: Make an appointment to see a Counselor, click on “Academic Progress”.
Progress Report – Progress grade D or below (high)	<p>Schedule an appointment with a Counselor to discuss plan for improvement.</p>	<ul style="list-style-type: none"> ✓ Discuss withdrawals from course(s) ✓ Compton College Resources Application: Assistance with Wi-Fi hotspot, laptop loan, food, and housing insecurities. ✓ Refer to Library Student Success Center for Workshops ✓ Refer to Tutoring ✓ Counseling Appointments: Make an appointment to see a Counselor, click on “Academic Progress”.
Poor test performance/missed exam or quiz (medium)	<p>Meet with student to discuss plan for improvement, i.e. share online tutoring, Student Success Center workshops, etc. Schedule counseling appointment if applicable.</p>	<ul style="list-style-type: none"> ✓ Refer to Library Student Success Center for Workshop ✓ Refer to Tutoring
Incomplete or missing assignments (medium)	<p>Review class expectations with student. Schedule counseling appointment if applicable.</p>	<ul style="list-style-type: none"> ✓ Refer to Library Student Success Center for Workshops ✓ Refer to Tutoring



Referral

Academic Counseling (medium)	Counselor connects with student and provides academic counseling. Student Services Advisor schedules counseling appointment.	✓ Counseling Appointments : Make an appointment to see a Counselor, click on “Early Alert”.
Tutoring	Automatically sent to tutors.	No follow up needed

Academic Achievement

Progress Report – Progress grade A or B (high-automatic close)	Automatic follow up with student, letting them know they are making satisfactory progress in course.	No follow up needed
Student engaged (low-automatic close)	Automatic follow up with student, letting them know they are making satisfactory progress in course.	No follow up needed
Student improving in class (low- automatic close)	Automatic follow up with student, letting them know they are improving in class.	No Follow up Needed