

Announcement: Financial Aid Alert Pilot

Scheduled for August 2024 Release

Prepared by Advising Training and Development

Overview of Alert

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 to intending to withdraw from the institution.

There is now a pilot alert called “Financial Aid Alert” that will notify Financial Aid staff through Navigate 360 when a staff member issues an alert for a student. This pilot is focused on a single alert. We will learn from the process for potential future alerts.

Access to alerts is based on your user role and is included in the staff base role for academic and non-academic staff. *This alert is not intended for new incoming students and transfer students.*

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

Reasons for Selecting Financial Aid Alert

Students needing timely support and outreach related to Financial Aid. This alert is intended for continuing CSU students not new incoming students.

Examples of reasons to send alerts:

- Your student is experiencing financial hardship (mentions housing insecurity, hunger, inability to afford books, etc.)
- Your student is failing classes and needs to discuss financial aid implications.
- Your student will be repeating a class for a third time and needs to discuss financial aid implications.
- Needs to discuss financial aid and/or scholarship implications
- Students who are looking to drop/add classes and financial aid implications.
- Students are withdrawing from the University/Semester and financial aid implications.

Alert Workflow and How to Issue “Financial Aid Alert”

When you select an Alert Reason, details and the actions that will take place are displayed.

- Alert is called “**Financial Aid Alert**”
- Available to all Care Units in Navigate
- Workflow for Staff members:
 - Staff submit alert and **should** include comments that explain the financial aid concern. Comments will give OFA (Office of Financial Aid) context regarding this alert and allow them to better support students.
 - Alert initiates a case and notifies OFA staff via email
 - Then OFA staff will manage the case
 - Goal for OFA is to connect with students within 3 business days
 - OFA staff will complete the following:
 - call student, email student, if no response after 2 days, they will repeat steps 1 & 2, and close case
 - Staff that issued the alert will receive an email once the case is closed with one of the following responses:
 - No reply-Reached out 3 times
 - Student took recommended action
 - Follow email with campus resources-no required meeting
 - Student contacted, no issues
 - No action needed, not applicable for alert
 - Note: the student will not receive an email about this alert at any step of the process.

How to Issue an Alert Screencast

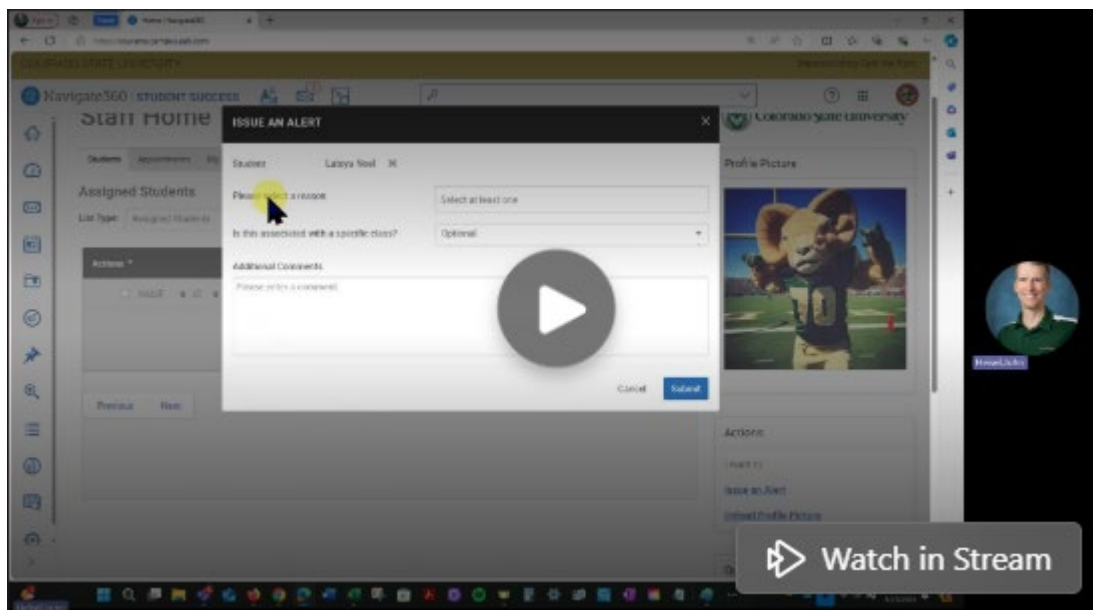


Figure 1: [Screencast of how to issue “Financial Aid Alert”](#)

How to Issue and Alert

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

Issue Alert from Staff Home Page

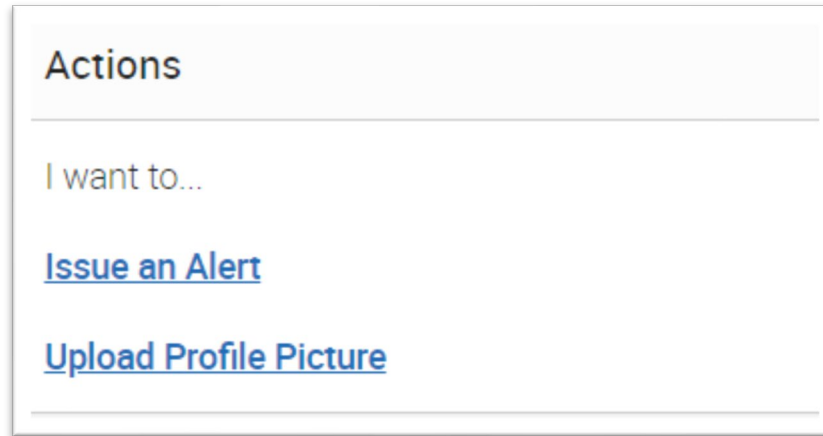


Figure 2: “Issue an Alert” on Staff Home Page

Issue Alert from Student Profile

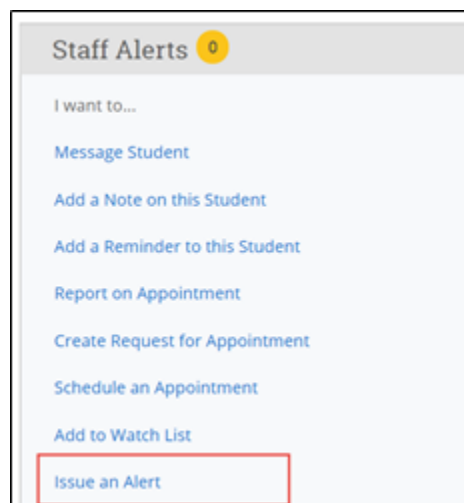


Figure 3: Selecting **Issue an Alert** from the Student Profile window opens the **Alerts** dialog. Text boxes in the dialog are in the list that follows the screenshot.

The screenshot shows a web form titled "ISSUE AN ALERT" with a close button (X) in the top right corner. The form contains the following fields and options:

- Student:** A text input field containing "888888888", which is circled in red.
- Please select a reason:** A dropdown menu with "Financial Aid Support" selected, also circled in red.
- Is this associated with a specific class?:** A dropdown menu with "Optional" selected.
- Additional Comments:** A large text area containing the text: "Cam the Ram expressed concern over paying for their books. They may need financial aid support, and I am issuing this alert to connect them with the Financial Aid Office. Please let me know if you have any questions." This area is circled in red.

Below the form, there is a summary section:

Below you will find the details for each Alert Reason chosen and what action(s) will be taken.

Financial Aid Support:

- A case will be opened and assigned to a staff

At the bottom right of the form are "Cancel" and "Submit" buttons.

Figure 4: A screenshot of the “Financial Aid Support” alert showing the three areas that staff need to complete: Student CSU ID number, Reason, and Additional Comments. Once the alert is issued, A case will be opened and assigned to a Financial Aid staff member.

Additional Comments: Enter comments in this box with additional information for the Financial Aid

There is no character limit to this field.

Important. Any information you enter in Navigate360 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).

CSU Support Requests, Online Resources

- [Submit a support request through the Advising at CSU website](#)
- [Advising Training and Development resources](#)

Resources in Navigate 360 Help Center

- [Alerts resource in Navigate Help Center](#)

Updated 8/27/24

- [Navigate Help Center \(search for “Alerts” in the help center for additional resources\)](#)