Corequisite Student Outreach and Extended Support Toolkit

The University of Texas at Austin
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Purpose

This toolkit is a guide for establishing a formal, streamlined, and systematic way to help students connect with student services and other support resources, and to encourage self-advocacy and increased use of campus resources. The toolkit shares a process that brings together faculty, advising, student services, and students in maximizing the visibility and use of resources at the college. The process includes self-assessment and reporting, faculty input and conferencing, and advising sessions. Development of this process requires a time commitment of at least one year.[1]

Users

An implementation team consisting of, but not limited to, an administrator who can make executive decisions; program coordinators and/or lead faculty from departments that have corequisite course offerings; at least one lead advising staff member; a lead IT project manager; and a counseling or student success services staff member.

Description of the Corequisite Student Outreach Process

Phase I: Self-reporting

Students identify their needs.

1. Self-reporting student survey: Students enrolled in corequisite support complete a survey that identifies their goals and needs. The survey should be embedded in the Learning Management System (LMS) for the course in an introductory or orientation module (e.g., Canvas, Blackboard, D2L).
2. Review of survey: Faculty review survey results and contact students before the end of the second week of the semester. Faculty communicate relevant resources to students individually (e.g., via email, conference). Depending on the college's staff roles, a counselor, advisor, or success coach might be able to fulfill this step.

[1] At Houston Community College, the implementation team met for one academic year before piloting in the summer. The following conditions enabled the work to be completed within a single year: the course management software/platform was already coded to identify corequisite students in college-level course rosters; the team members were assigned so there was no need for recruitment of members; an IT representative was in charge of the project throughout the entire year and attended meetings; weekly meetings were held; subcommittees were formed as needed; and team members were on contract over the summer and were able to organize and participate in the pilot. For institutions with different conditions, the time commitment can be expected to be up to twice as long.

Phase II: Prevention and intervention

Faculty and student services follow up on student needs and identify continued challenges and possible remediations,

1. Student conference: One week before mid-semester (Week 5 of a 16-week course) or at mid-semester, the instructors of corequisite courses should identify students who are failing, are at risk of failing, or who seem to need more targeted intervention, and have a short conference with them. Faculty should set aside one course day to conference with students during class time. Conferencing can be done virtually, over the phone, or over email.[2] The following parameters can be used to identify students who will benefit from this intervention.
    - Students whose course average is 70 or below at mid-semester
    - Students whose mid-semester exam or assessment score was 70 or below
    - Students who have excessive absences
    - Students who have reported or displayed other issues that might be hindering their success in the course
2. Mid-semester assessment report: Faculty complete mid-semester assessments based on information gathered during student conferences as well as on student performance. Completing the report will initiate the communication process. The college-level instructor and, if necessary, the developmental course instructor complete the assessment reports (see Figure 1).
3. Reset workshop: The advising department hosts and leads a live group session (virtual or in person) that reminds students of available campus resources (see Appendix A, Student Self-Advocacy and Reset Workshop).
    - Incentives – The implementation team may consider incentivizing attendance by recommending that faculty assign it as extra credit, make attendance a condition for test retakes or something similar that aligns with course policies, or advertise that food would be provided during the workshop. Other incentives, such as bus passes, door prizes, swag bags, etc., should be considered.
    - Class time – The workshop can be scheduled when multiple corequisite classes are meeting so students can attend during their class time as opposed to having to fit the workshop into their schedules.

[2] Students will benefit from an earlier meeting with faculty, so one week before mid-semester is the better timeframe for this conference. The implementation team should choose the timeframe that works best for their faculty and students as long as this touchpoint falls before the end of the mid-semester week.

Phase III: Extended support

Faculty provide additional information about students who did not succeed in the course so they can be offered adequate extended support.

1. End of course report: Faculty complete end of course reports based on information from course assessments and/or student conferences (see Figure 2).
2. Individual Study Plan (ISP): Based on information entered by faculty, an Individual Study Plan is generated by the college's course management system and sent to reporting faculty, student, and advising (see Figure 3).
3. Meeting with advisor, student success coach, or counselor: If students have assigned advisors, those advisors meet with their students before the beginning of the following semester. If students do not have assigned advisors, the student should meet with any advisor available before the beginning of the following semester. Depending on the college's staff roles, a counselor or success coach might be able to fulfill this step. Whichever department is chosen for this touchpoint should be represented in the implementation team during the planning and building process.

Outline of the Implementation Process

To create and implement the Corequisite Student Outreach Process, which requires at least one year, the implementation team completes the following steps.[3]

Step I: Preliminary preparations (4–6 weeks)

- Convening of the implementation team (2 weeks)
- Inventory of student services and support resources (3–4 weeks)

Step II: Discussion and creation of relevant materials (10–12 weeks)

- Self-reporting, student survey (2–3 weeks)
- Mid-semester assessment report and process (4–5 weeks)
- Extended support, end of course report, ISP (4–5 weeks)

Step III: Information Technology (IT) implementation (10–14 weeks)

- IT consultation with the implementation team, as needed.

Step IV: IT testing (6–8 weeks)

- Testing round 1
- Results and discussion
- Revisions
- Testing round 2

[3] The outline includes an estimated time to complete each step. As stated previously, if conditions are different at the initiation of this process (see footnote 1), the time commitment could double.

Step V: Pilot/implementation prep work (6–8 weeks)

- Creation and dissemination of testing guide (2–3 weeks)
- Meeting with relevant leadership to introduce the Corequisite Student Outreach Process (1 week)
- Training sessions for corequisite faculty and advising team and/or student success staff (3–4 weeks, and ongoing)

Guided Instructions for Each Step of the Implementation Process

Step I: Preliminary preparations (4–6 weeks)

1. Convene a committee or implementation team (referred to as “the team” for the remainder of the document) with members from the following groups.
    - **Administrator:** A relevant member of administration (e.g., Dean of College Readiness, Dean of Student Success, Director of Corequisite Program or similar role) who can make executive decisions that enable the team to move forward
    - **Program coordinators or department lead faculty:** Program coordinators and/or lead faculty from departments that have corequisite course offerings
    - **Advising:** At least one lead staff member from advising
    - **Student success coach/counselor:** One member from counseling or student success services
    - **IT:** At least one lead project manager from campus IT
2. The team gathers information about available student services and support resources at the college. (Refer to the Dana Center’s *Communicating Support Resources to Corequisite Students Toolkit*.) Representatives from the various student services should be involved, when appropriate, in the processes detailed in this guide.

Step II: Discussion and creation of relevant materials (10–12 weeks)

1. Self-reporting student survey: The team develops this student survey, creating questions that are specific to possible student needs within the college demographics. The team should share the survey with corequisite faculty each semester. Questions can be categorized into the following groups.
    - Academic needs
    - Career/college needs
    - Personal needs

2. Mid-semester assessment report: The team develops this academic assessment report for the faculty of record to complete in consultation with their students. IT sets up the report to appear in the course roster for all corequisite students. The purpose of this report is to follow up on previously self-reported needs and challenges and to provide an intervention mechanism for students who might need to be directed to campus resources. Basic course and student information should auto-populate (e.g., course number, instructor name, student name, student ID number).

   The following information should be documented in the report. When possible, the data to be gathered should appear in a checkbox format for time-saving purposes and ease of use.

   - Assessment data: Tool, score, course average, or qualitative questions if the team wants to account for instructors who have not yet given/scored major assessments
   - Student challenges: Attendance, academic, technology, personal, other (checkbox)
   - Steps already taken by instructor: Early alerts, attempted contact, one-on-one meeting, recommended tutoring, makeup assignments, other (checkbox)
   - Detailed explanation of student's current progress (textbox)
   - Recommendations to the student (textbox)[4]
   - Student conference notes (textbox), date of conference

3. Decision tree/Individual Study Plan (see Appendix B, Decision Tree): The decision tree is a map of several recommended pathways for students who, despite the intervention strategies in place, fail both the college-level course and support course, or fail the college-level course. The team decides on the recommended pathways depending on available options and support services at the college; these recommendations should be as individualized as possible.

   The decision tree should be used to create the end of course report and the ISP; the recommendations on the decision tree will appear as options that faculty choose for their students when completing the end of course report. The recommended pathway option from the decision tree, along with other relevant information (refer to Figure 3), populates the ISP, which will be reviewed with the student during an advising session.

   - Students who failed both the support course and the college-level course will have their own pathway recommendations.
   - Students who failed only the college-level course will have their own pathway recommendations.

[4] The information regarding the student's current progress and recommendations for the student can be combined into one textbox. Additionally, the recommendations can be specified in the "Student Conference Notes" box. The team should discuss and build a form that best suits the students and faculty as long as the relevant information is documented and conferences with students are taking place.

4. End of course report: The team develops this reporting tool to be completed by the faculty of record for students who receive a non-passing grade in the college-level course. This report only appears in the student roster once a failing grade has been entered. The team determines whether a failing grade is D and below, or F and below.

   The purpose of this report is to document the student's challenges that may have prevented them from succeeding in the course. The following information is documented in this report; when possible, the data to be gathered should appear in a checkbox format for time-saving purposes and ease of use.

   - Assessment data: Tool, score, official final grade (checkbox)
   - Student challenges: Attendance, academic, technology, personal, other (checkbox)
   - Steps already taken by instructor: Early alerts, attempted contact, recommended tutoring, make-up assignments, other (checkbox)
   - Detailed explanation of why the student was unsuccessful in the course (text box)
   - Course student learning objectives that were not met: This list of official course objectives is used to determine the recommendations in the ISP (checkbox).
   - Selected recommended support: This list is generated using the inventory of campus resources. Sample items on the list: Stand-alone developmental course, re-enrollment in the corequisite course, mandatory tutoring, enrollment in course section with supplemental instructor, counseling services, financial aid, basic needs resources, other

5. Individual Study Plan (ISP): This document self-generates based on the information entered in the end of course report. The ISP is used as a guide for the student's subsequent meeting with advising. During this meeting, the advisor makes a recommendation to the student for extended support. The following information should populate from the instructor-filled end of course report.

   - Mid-semester assessment report results
   - End of course report results
   - Course student learning objectives identified as not met
   - Faculty-recommended support and success path or intervention strategy

   The ISP should also include a textbox for the advisor to record the conference notes, a date field to document when the conference occurred, and a SAVE/SEND NOTIFICATION action.

Step III: IT implementation (10–14 weeks)

Once the team has developed and finalized the above instruments, IT translates these documents onto the college's LMS. The reports above should appear in the student roster as clickable links. If an instrument is to be used for only a certain group of students (e.g., students in corequisite courses), then the first step is to use the campus LMS to identify these students. Coordination and collaboration with the registrar or Institutional Research department may be required. If instruments are to be used for all students, then IT should make these reports available to all faculty, using the class roster to house them (see Appendix C, Involving IT Services in Corequisite Student Outreach).

The implementation team decides which approach works best, but it is recommended that IT construct the instruments online as they become available. This approach to begin immediately can avoid or minimize an accumulation of IT tasks at this point in the timeline.

Step IV: IT testing (6–8 weeks)

1. Testing round 1
    - IT develops testing for the process and instructions for faculty.
    - The team informs chairs and selected faculty of the first round of testing and organizes a briefing. During this session, IT staff go over instructions for testing with the selected faculty and set a timeline for faculty to test and provide comments (a 1-week deadline is recommended). Comments should focus on ease of use, intuitiveness, access to necessary forms and fields, etc. IT can decide whether to provide a form for comments, such as Microsoft Forms, or if faculty comments can be communicated via email.
2. Results/discussion
    - The team convenes a meeting to discuss test results and any necessary revisions.
3. Revisions
    - IT implements revisions to the forms.
    - IT prepares for the second round of testing, which includes any revisions of testing instructions and asking selected faculty to run the testing process again. Faculty for the second round of testing should have also participated in round 1.
4. Testing round 2
    - Faculty test the entire process again and provide comments on any remaining issues.

Step V: Pilot/implementation prep work (6–8 weeks)

1. Create and disseminate the testing guide. Revise the testing instructions, as needed, for faculty. The team and IT project lead should draft the brief guide, which should include the following information.
    - Rationale and purpose of the corequisite student outreach process
    - Information on how to access reports
    - Instructions on how and when to complete reports
    - Review of communications (who receives what communication and why)
2. Meet with relevant leadership to introduce the Corequisite Student Outreach Process.
    - Program coordinators should have communicated with their faculty prior to this meeting.
    - During the meeting, the team may use the guide to review the process with relevant leadership.
    - During the meeting, the team should also review expected outcomes of the process.
3. Hold training sessions for corequisite faculty and advising team and/or student success staff. IT and the implementation team can conduct the training in person and/or online, and plan for multiple sessions, if needed. Training videos should be produced for future reference. IT's involvement ends here, and the team or designated leaders in the respective college divisions can organize future training sessions.
4. Pilot the outreach process with a select group of courses for one semester before rolling out to all relevant courses.

Figure 1.


Faculty Class Roster

Student Mid-Semester Assessment Report

Mid-Semester Assessment Report

Student Mid-Semester Assessment Report

Faculty Name: **Date:**

Subject: **Catalog Nbr:** **CRN:** **Term:**

Student Name: **Student ID:**

Assessment Data

Assessment Tool: **Assessment Score:**

(i.e. midterm exam, report, essay, etc.

Course Average: (Midsemester)

Student Challenges (Check all that apply):

- Attendance
- Academic
- Technology
- Personal
- Other:

Steps Taken (Check all that apply):

- Submitted Early Alerts
- Attempted Contact (email, phone, etc.)
- Recommended Tutoring
- Offered Make Up Assignments
- Other:

Please provide a detailed explanation of the student's current progress in the class:

Recommendations to the student to improve course performance:

Faculty Conference (to be completed after the conference)

Date: **Conference Occurred:** Yes No

Comments/Notes:

Notifications

Send Notifications
Check when you are ready to send notifications for this form

Last Sent: Not Sent

Save Cancel

Figure 2.

Student End of Course Report

Faculty Name: **Date:**

Subject: **Catalog Nbr:** **CRN:** **Term:**

Student Name: **Student ID:**

Assessment Data

Assessment Tool: **Assessment Score:**

(i.e. final exam, report, essay, etc.)

Official Grade:

Student Challenges (Check all that apply):

- ☐ Attendance
- ☐ Academic
- ☐ Technology
- ☐ Personal
- ☐ Other:

Steps Taken (Check all that apply):

- ☐ Submitted Early Alerts
- ☐ Attempted Contact (email, phone, etc.)
- ☐ Recommended Tutoring
- ☐ Offered Make Up Assignments
- ☐ Other:

Why was the student unsuccessful in course completion? Please be detailed.

What Course Student Learning Objectives (CSLOs) does the student need additional support?

- ☐ Demonstrate knowledge of individual and collaborative writing processes.
- ☐ Develop ideas with appropriate support and attribution.
- ☐ Write in a style appropriate to audience and purpose.
- ☐ Read, reflect, and respond critically to a variety of texts.
- ☐ Use Edited American English in academic essays.

Select recommended support (check all that apply)

- ☐ Stand-alone development course
- ☐ Mandatory tutorial
- ☐ End of Course Assessment Re-evaluation*
- ☐ Enrollment in course section with Supplemental Instructor
- ☐ Other:

Additional Comments

Save and Continue to ISP | Cancel

Figure 3.

Faculty Class Roster

Individual Study Plan

Individual Study Plan

Faculty Name:

Subject: **Catalog Nbr:** **CRN:** **Term:**

Student Name: **Student ID:**

Mid-Semester Assessment Results

Tool:

Score:

Mid Average:

End of Course Report Results

Tool:

Score:

Official Grade:

Course Student Learning Objectives (CSLOS) Not Met

1

2

3

Faculty Recommended Support

-
-

Remediation Options & Intervention

Support Course Grade:

Success Path Recommended Option:

-
-

Intervention/Strategies:

- Lexile-Reading Level Diagnostic
- OER (reading competencies/grammar)
- Upswing
- In-person/synchronous tutorial
- Turnitin.com
- Citation style formatting (MLA, APA, and Chicago)
- Mid-Term (Assessment) Review Session **
- Mid-Semester Assessment
- Final Exam (Assessment) Review Session***

☐ **Override Recommended Option (For Advisor Use Only)**

Advisor Conference (to be completed after the conference)

Date:

Comments/Notes:

Notifications

☐ **Send Notifications**

Check when you are ready to send notifications for this form

Last Sent:

User Entry

Last Update User ID: **Last Update Timestamp:**

Save Cancel

Appendix A: Student Self-Advocacy and Reset Workshop

Purpose

Because students are presumably getting information about student services and resources during orientation sessions at the beginning of their college journey, or during advising sessions at the beginning of each semester, it is recommended that this workshop take place around mid-semester (Week 7 or 8 in a 16-week course) to serve as a reminder and intervention point.

If the college is using a mid-semester progress reporting tool for corequisite students, the workshop and messaging can be tailored to those students whose grades are D or below.

Users

Advisors; student services, as needed

Instructions

The advising department should prepare the Student Self-Advocacy and Reset Workshop. Advising, in this case, serves as the point of reference for students and/or as a connection to other student services.[1]

Advising should consult with the implementation team in planning the workshop and may choose to involve members of other student services, as needed. A corequisite faculty representative should also attend the event.

Workshop Components and Logistics

The following topics and questions should be covered in the workshop.

1. What is advising's role? What can advising do for students?
    - Are all students assigned an advisor?
    - How will students know who their advisor is?
    - How should students contact their advisor?
    - What can the student expect from their advisor?
    - Information on course modalities, COVID-19 changes, relevant links
2. Overview of student services (Provide a contact person or link for each service.)
    - Tutoring
    - Financial aid

[1] The implementation team may decide to assign this workshop to another college department, such as counseling or student success.

- TRIO
- Libraries – especially in relation to technology and hotspots available
- Computer labs on campus
- Help from IT
- Counseling
- Student organizations (to help with students' sense of belonging)
- Relief assistance on campus
    - Food pantry
    - Housing
    - State funding/emergency funding
    - Other

3. Overall good college habits
    - Communication with instructor
    - Study habits
    - Time management
    - Self-advocacy
4. Encouragement to communicate with their advisor
5. Q&A

Scheduling and student attendance

To encourage attendance, the implementation team may choose to incentivize students to attend this event and/or to schedule the workshop during class time.

Sample messaging to students

Dear [STUDENT NAME],

The Mid-Semester Assessment Report has been submitted for you for [COURSE NAME & #]. If you have not yet discussed this report with your instructor, contact your instructor immediately.

Both your instructor and the advisors at [INSERT INSTITUTION'S NAME] are committed to your success. To aid you in successful completion of your course(s), [INSERT INSTITUTION'S NAME] Advising department will host a Student Self-Advocacy and Reset Workshop. During this workshop, you will have the chance to discuss or ask questions about advising, resources, or any concerns you might have about your experiences at [INSERT INSTITUTION'S NAME]. You are strongly encouraged to attend.

The workshop will be held [INSERT WHEN, WHERE, PLATFORM, ETC.].

Please register for the event here: [INSERT LINK TO REGISTRATION FORM]

Sample registration form

REGISTRATION FOR VIRTUAL RESET WORKSHOP - March 31, 5-6pm

During this workshop hosted by Advising, Coreq students will be reminded about useful HCC resources and student services available to them. Additionally, students will learn about time-management and other useful strategies for student success. Time for questions will be scheduled during this session.

LINK TO ATTEND WORKSHOP (THURS, MARCH 31, 5 PM-6 PM)

https://hccs.webex.com/hccs/j.php?MTID=mb9de650b4fa09325c2fa818cb5cafdb4 (https://hccs.webex.com/hccs/j.php?MTID=mb9de650b4fa09325c2fa818cb5cafdb4)

* This form will record your name, please fill your name.

1. Student's Last Name:

2. Student's First Name:

3. Student HCC ID Number:

4. Student's HCC Email:

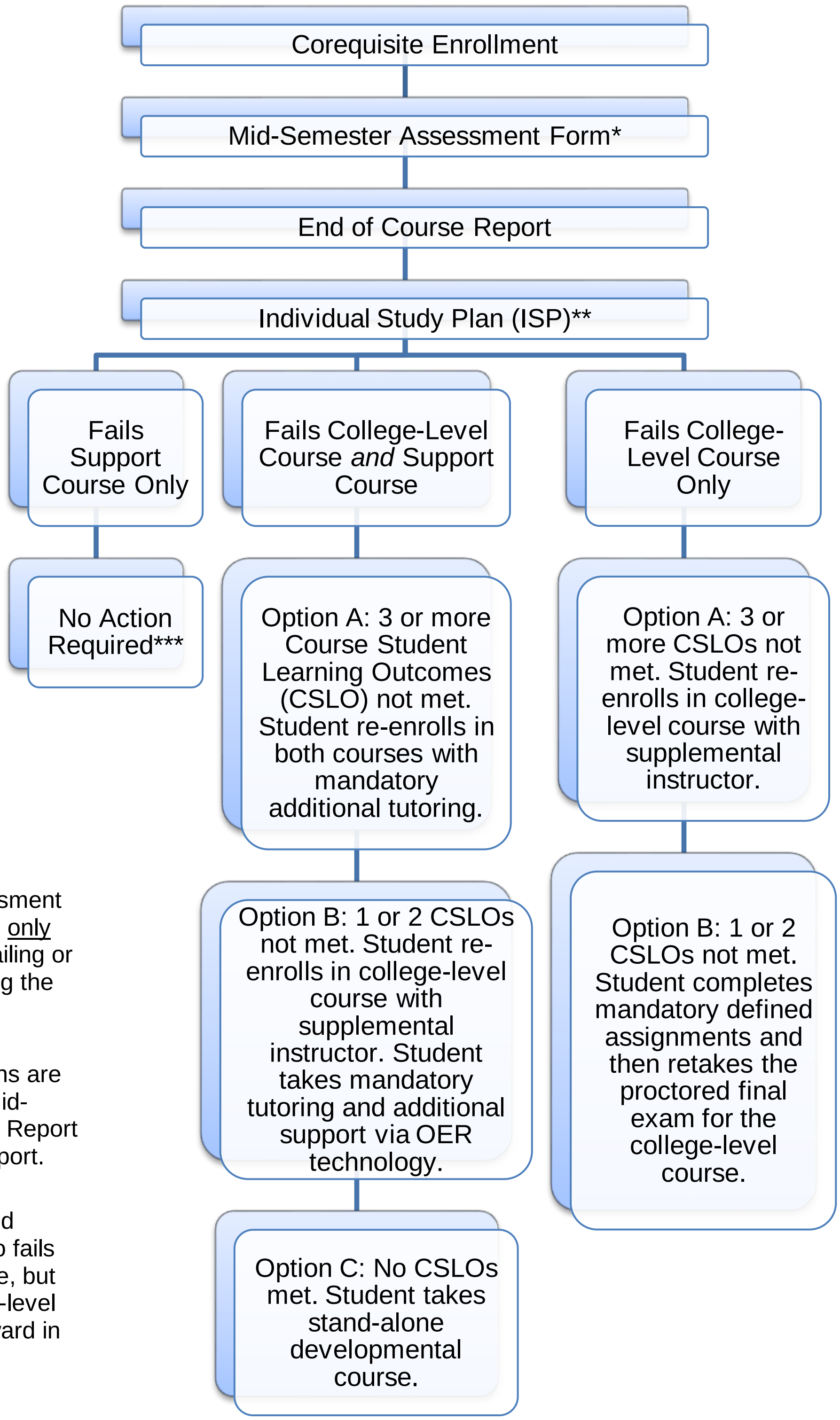
5. Have you been in touch with your instructor(s) in your Coreq paired courses regarding your current progress in the courses?

◯ Yes

◯ No

6. Questions or Concerns For Workshop Facilitator (Advisor)

Appendix B: Decision Tree



* Mid-Semester Assessment Report should be used <u>only</u> for students who are failing or are in jeopardy of failing the course.

** Individual Study Plans are developed based on Mid-Semester Assessment Report and End of Course Report.

*** No action is required because a student who fails only the support course, but still passes the college-level course, can move forward in their college studies.

Appendix C: Involving IT Services in Corequisite Student Outreach

Purpose

This resource helps the implementation team and campus IT services plan, design, and administer student surveys and reports. This document also provides sample templates and messaging that can be customized for students, faculty, and advisors.

Users

Implementation team; campus IT services, including an IT project manager or lead

Instructions

The implementation team works with IT services during the entire planning, design, and implementation process. An IT project lead should attend all planning, design, and implementation meetings.

It may take 10–14 weeks for IT to set up the process for testing. During that time, IT consults with the implementation team, as needed, and begins building instruments soon after they have been approved, rather than waiting until all materials have been approved by the team. This approach will minimize an accumulation of IT tasks that may delay the process.

Components

Student survey

Goal: To help students assess their needs, to identify student needs early, and to provide faculty with other relevant information about their students.

1. The student completes the survey.
2. The student, instructor and advisor [1] can view results.
3. Survey results are stored where the student, instructor, and advisor can access them.
4. Automated reminders are sent to students who have not yet completed the survey.

One possible location for accessing and storing survey results is the college's Learning Management System (LMS) (e.g., Canvas, Blackboard). IT services can set up the information as a resource for faculty to upload to their course LMS page. Faculty could assign students to complete this survey in an orientation or introduction module.

[1] Note: "Advisor" is used throughout this resource; however, locally, this position may be called an academic success coach, counselor, or by another title.

At the end of this process, instructors will have additional information about their students to encourage student success in the course.

Mid-semester assessment report

Goal: To identify barriers to student success, provide relevant student support, and encourage self-advocacy.

1. The instructor completes the mid-semester assessment.
2. The student, instructor, and advisors can view the completed report.
3. Reports are stored where the student, instructor, and advisor can access them.
4. Upon submission of a report for a given student, the instructor receives an automatic confirmation message.
5. An automatic message is sent to the student about the completed report with information about the Self-Advocacy and Reset Workshop.
6. Automated repeat messaging is sent to the student if the message has not been opened in three days.
7. The student's advisor is sent a message about the student's mid-semester report.

The location of this report should be in the course roster, which can be accessed in the college's Information Management System (IMS) (e.g., PeopleSoft, Ellucian). Instructors and advisors typically have access to this information; student success staff may not. The implementation team should decide whether advisors or other student success staff should have access to the report and be a part of the mid-semester report process.

By the end of this process, students who are failing or are at risk of failing either of the corequisite paired courses will have had a conference with their instructor and received specific recommendations for course success. Students will have the opportunity to attend a workshop to learn about student support services on campus, time management, and self-advocacy.

End of course report

Goal: To identify barriers to student success, provide relevant student support, encourage self-advocacy, and guide students to their best path moving forward

1. Instructor completes the end of course report.
2. The student, instructor, and advisor can view the completed report.
3. Reports are stored where student, instructor, and advisor can access them.
4. Instructor and advisor receive automatic message confirming submission of the report.
5. The student receives an automatic message about the report and gets an Individual Study Plan (ISP) and a task notification on their dashboard.
6. An automated repeat/reminder message is sent to the student if the message has not been opened after three days.

7. The student's assigned advisor receives an automatic message and notification of student's tasks.

The report should be located in the grade roster for the course, which can be accessed in the college's IMS.

At the end of this process, students will have met with an advisor to discuss their best options based on the decision tree (see Appendix B, Decision Tree).

Individual Study Plan

Goal: To ensure the student receives the necessary support to succeed in the course on their next attempt (or, in one case, by retaking the final) based on their earlier performance.

1. The ISP is populated automatically with information from the end of course report.
2. The advisor uses the individualized success plan in one-on-one meetings with the student to help choose the best option moving forward.
3. After meeting with the student, the advisor enters additional information in the ISP.
4. The student, instructor, and advisor can view the student's ISP.

IT Role

With the input of the implementation team, IT will:

1. Create a function to identify all corequisite courses on PeopleSoft or similar management software if this function is not already in place.
2. Create a function to identify corequisite students in both the non-credit course and the college-level course instructor rosters if this function is not already in place.
3. Create the student survey form for all corequisite students to complete upon registering for a corequisite course.
    - The completed surveys should be accessible to faculty and advisors through an automated process within PeopleSoft or similar management system.
    - Alternatively, a student's survey may be made accessible only on a student platform of the college's management system; faculty and advisors would request the completed survey from students upon initial meeting.
4. Create the mid-semester assessment report form for all corequisite students within the course roster function of Peoplesoft or similar management software. This report should be accessed using a link [CREATE]. Once created and saved, the link wording will change to [VIEW/MODIFY].

Enrolled Students Personalize | Find | First 1-12 of 12 Last

	Drop	Early Alert	Notify	Photo	ID	Name	Grade Basis	Units	Program and Plan	Level		Note	Student FERPA	Mid-Sem Asmnt
1					[redacted]	[redacted]	Graded	0.00	Business - AA Business	Freshman	Withdrawn			
2					[redacted]	[redacted]	Graded	3.00	Business - AA Business	Freshman		Co-Req		View/Modify
3					[redacted]	[redacted]	Graded	3.00	Health & Medical Sciences - AS Biology - Health Sciences	Freshman		Co-Req		View/Modify
4					[redacted]	[redacted] A	Graded	3.00	Liberal Arts & Humanities - AA Multidisciplinary Studies	Freshman		Co-Req		Create
5					[redacted]	[redacted]	Graded	3.00	Social Science, Human Services - AS Psychology	Freshman		Co-Req		Create
6					[redacted]	[redacted]	Graded	3.00	Math, Earth, Natural Science - Associate of Science	Freshman		Co-Req		View/Modify
7					[redacted]	[redacted]	Graded	3.00	Health & Medical Sciences - AS Biology - Majors and Pre-Me	Sophomore		Co-Req		Create

5. Create automated messages triggered by the mid-semester assessment report.
    a. Messaging for Student (includes report and an invitation to a group advising session, the Student Self-Advocacy and Reset Workshop)
    b. Messaging for Faculty
    c. Messaging for Advising (optional)
6. Create the end of course report form and create a function making this form available to complete on the instructor's grade roster, only after a final grade of D or below has been entered for an individual student.

Student Grade | Transcript Note

		ID	Name	Roster Grade	Official Grade	Grading Basis	Program and Plan	Last Date of Educational Activity	Level		CoReq Course	End Crse Rpt
	1	[redacted]	[redacted]		W	GRD	Business - AA Business		Freshman	Graded		
	2	[redacted]	[redacted]	D	D	GRD	Business - AA Business		Freshman	Posted	Mejia,Melinda INRW 0300 B	
	3	[redacted]	[redacted]	FX	FX	GRD	Health & Medical Sciences - AS Biology - Health Sciences	11/17/2021	Freshman	Posted	Mejia,Melinda INRW 0300 FX	View/Modify
	4	[redacted]	[redacted] A	C	C	GRD	Liberal Arts & Humanities - AA Multidisciplinary Studies		Freshman	Posted	Mejia,Melinda INRW 0300 B	
	5	[redacted]	[redacted]	C	C	GRD	Social Science, Human Services - AS Psychology		Freshman	Posted	Mejia,Melinda INRW 0300 B	
	6	[redacted]	[redacted]	D	D	GRD	Math, Earth, Natural Science - Associate of Science		Freshman	Posted	Mejia,Melinda INRW 0300 B	
	7	[redacted]	[redacted]	A	A	GRD	Health & Medical Sciences - AS Biology - Majors and Pre-		Sophomore	Posted	Mejia,Melinda INRW 0300 A	

7. Create the ISP form. All the fields for this form should self-populate except for the "Override Recommended Option (For Advisor Use Only)" box and the "Advisor Conference" box.
8. Create an automated message triggered by the end of course report and ISP.
9. Create a function that triggers a subsequent TASK or TO-DO ITEM on the student profile when an ISP is created for that student.

Use Case Templates

A use case template is a process document that describes how a system will be used to achieve a specific goal. This template identifies the actors/roles, triggers, actions of a system, the successful flow and outcome, and alternative flows.

The implementation team may want to provide a sample use case template similar to the one below.

Sample use case template

Use Case: Describes task that user wants to complete or perform. *This scenario starts when […] and ends when […].*
Primary Actor/Role: Identifies main user who initiates interaction with system to complete task.
Additional Actor/Roles: Identifies other users who will participate in the process.
Activity Diagram/Basic Flow: Describes basic actions that will complete the process, representing the successful flow of actions.
Alternative Flow: Describes less common possible interactions or deviation from the basic flow. There may be several alternative flows.
Exception Flow: Describes possible items or actions that would prevent user from completing the task within the system (e.g., using the wrong password).
Risks: Identifies possible items or actions that would prevent user from completing this process.
Postcondition or Next Step: Identifies status of task after completion of the process. What defines a task as complete? Are there next steps?

Sample mid-semester assessment report

Use Case: Create a mid-semester assessment report.

Primary Actor/Role:

Instructor A (developmental-level course) or Instructor B (college-credit course)

Additional Actor/Roles:

- Student enrolled in corequisite course who has a grade of C or lower at mid-semester
- Advisors

Activity Diagram/Basic Flow:

1. Instructor A signs into PeopleSoft.
2. Instructor A accesses Class Roster.
3. Instructor A accesses Mid-semester Assessment Report Form in Class Roster by clicking CREATE.
4. Instructor A completes form and clicks Save/Submit/Send Notifications. This action triggers the following:
    a. Notification sent to both corequisite and college-level faculty.
    b. Notification sent to student with message/email that instructs student to meet/conference with instructor if that has not already occurred. This message includes the information for the Student Self-Advocacy and Reset Workshop.
5. Student receives message/email.
6. Advisor also receives the message via email, which does not trigger action from the advisor at this point.
7. Student attends Student Self-Advocacy and Reset Workshop and is connected with relevant campus support resources.

Successful when: Form is completed, and student connects with relevant supports.

Alternative Flow 1:

If student does not open message, student will be sent a reminder after 2 days and then another reminder after 3 days.

Risks:

- Student does not have reliable internet access.
- Student is unable to attend advising workshop.
- Student is locked out of the system.
- Student does not have reliable electronic device.

Postcondition or Next Step: Mid-semester assessment report form is completed and saved within the management system and is available to be viewed by student, instructors, and advisors.

Sample end of course report and Individual Study Plan use case scenario

Use Case: Create an end of course report.

Primary Actor/Role:

Instructor A (developmental-level course) or Instructor B (college-credit course)

Additional Actor/Roles:

- Student enrolled in corequisite course who failed the course
- Advisors

Activity Diagram/Basic Flow:

1. Instructor A signs into PeopleSoft.
2. Instructor A accesses Grade Roster.
3. Instructor A accesses End of Course Report (ECR) Form in Grade Roster by clicking CREATE; only available for students for whom a final grade of F has already been posted.
4. Instructor A completes form and clicks Submit. The submission does not trigger communication; it simply populates the ISP and opens it for instructor to complete, and then sends communications.
5. Instructor A completes the ISP form and submits/saves/sends notification.

   The following is triggered with the submission of ISP:

   a. Task Notification on Student's To-Do List with instructions to acknowledge – "ISP Meet with Advisor"
   b. Email to instructor confirming that ECR and ISP have been submitted
   c. Email to advisor indicating that their student has an ECR and ISP.
   d. Message Center/Email with ECR to student instructing student to set up a meeting with advising to go over ISP.
6. Student meets with advisor to go over ISP.
7. Advisor notes this on ISP, and information is visible to faculty and student.

Successful when: Form is completed, and student meets with advisor and together they choose the best path for the student. Student registers for the following semester.

Alternative Flow 1:

If student does not open message or to-do list: A reminder is sent after 2 days and then another after 3 days; a third reminder is sent to student a week before the registration deadline.

Alternative Flow 2:

If student does not meet with advisor: An alert is sent to advisors, who then attempt contact.

Risks:

- Student does not have internet access.
- Student is unable to meet with advisor because of transportation or other issues.

Postcondition or Next Step: ECR and ISP forms are completed and should follow the student within the management system to be viewed by student, relevant instructors, and advisors.

To learn more about use case scenarios, consult the following resources:

- https://www.usability.gov/how-to-and-tools/methods/use-cases.html
- https://www.researchgate.net/figure/Use-cases-for-a-library-This-shows-an-example-of-business-use-cases-for-a-library_fig1_335168805

Sample Messaging

Mid-semester assessment report

Sample messages to faculty and students are shown below. There is no message sent to advisors at this time.

Reminder message for faculty (send 10–14 days before report is due)**:**

Dear [INSTRUCTOR NAME],

As part of the process of assisting students who are failing or are at risk of failing your class, a mid-semester assessment form has been developed for use in reaching out to these students. Please complete the report by [INSERT DATE]. Below is an outline of the process.

Mid-Semester Assessment Report Process:

1. Identify students who are failing or are in jeopardy of failing.
2. Conduct a student conference with each student.
3. Complete a mid-semester assessment report for each student in PeopleSoft (due one week after mid-semester).
4. The report will be automatically emailed to each student.

Message for student:

Dear [STUDENT NAME],

A Mid-Semester Assessment Report has been submitted for you by your [COURSE #] instructor, [INSTRUCTOR NAME]. By now you should have already met with your instructor to discuss your progress.

Please contact your instructor or your advisor if you have questions or concerns. [INSERT INSTITUTION'S NAME] has many resources available to help you succeed. You'll receive information soon about a Student Self-Advocacy and Reset Workshop. You are strongly encouraged to attend the workshop.

Alternate message for student:

Dear [STUDENT NAME],

A Mid-Semester Assessment Report has been submitted for you for [COURSE NAME & #]. If you have not yet discussed the Mid-Semester Assessment Report with your instructor, you should contact your instructor immediately.

Both your instructor and the advisors at [INSERT INSTITUTION'S NAME] are committed to your success. To aid you in successful completion of your course(s), [INSERT INSTITUTION'S NAME] advising department will host a Student Self-Advocacy and Reset Workshop. During this workshop, you will have the chance to discuss or ask questions about advising, resources, or any concerns about your experiences at [INSERT INSTITUTION'S NAME]. You are strongly encouraged to attend.

The workshop will be held: [INSERT WHEN, WHERE, PLATFORM, ETC.]

Please register for the event here: [INSERT LINK TO REGISTRATION FORM]

Message for faculty:

Dear [INSTRUCTOR NAME],

Your Mid-Semester Assessment Report for [STUDENT NAME, ID #] has been received.

End of course report

Sample messages for students, faculty, and advisors are shown below.

Message for student:

Dear [Student Name],

An End of Course Report and Individual Study Plan have been created for you. There is a new item on your To-do Checklist (Student Center). You will need to meet with an advisor to review your Individual Study Plan and Success Path. This will ensure you enroll in the adequate course(s) in the upcoming semester. After meeting with an advisor, please ACKNOWLEDGE the completion of your Checklist item in Student Center. All documents may be accessed using the following link: [LINK]

Message for faculty:

Dear [INSTRUCTOR NAME],

An End of Course Report and Individual Study Plan for [STUDENT NAME, ID #] has been received. This action has triggered a new item on the student's To-Do Checklist. The student has been instructed to meet with an advisor to review their Individual Study Plan and Success Path.

Message for assigned advisor:

Dear [ADVISOR NAME],

An End of Course Report and Individual Study Plan have been created for your student [INSERT STUDENT NAME AND ID #]. This action has triggered a new item on the student's To-Do Checklist. The student has been instructed to meet with an advisor to review their Individual Study Plan and Success Path.

Please meet with your student to review the Individual Study Plan together and confirm meeting in the portion of the ISP reserved for Advising Notes. The student can remove the item from their To-Do Checklist after they have met with an advisor. All documents may be accessed using the following link: [LINK]

The University of Texas at Austin
Charles A. Dana Center

The Charles A. Dana Center at The University of Texas at Austin develops effective mathematics and science innovations that support educators, administrators, and policymakers in creating equity-minded improvements at scale for students throughout K–12 and postsecondary education, especially those who are underserved.

The Dana Center works nationally to dismantle barriers in K–12 and postsecondary education systems and develop new or improved systems to ensure students—especially Black and Latino students and students experiencing poverty—build foundational skills, develop strong mathematics identities, and experience equitable access to and success in a modern, rigorous mathematics and science education.

Since its founding in 1987, the Dana Center has worked to create a quantitatively literate society and a next generation of STEM professionals that reflect the full diversity of American life. We are known for our success in developing and implementing equity-minded innovations in STEM education policy and practice that lead to student success in education and career. For more information about our programs and resources, visit www.utdanacenter.org.

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