Case Management and Student Success Requirements	
	Desired Functionality
Case Management	
1	Ability to track a currently enrolled student through the student lifecycle in one place where multiple users can access the record
2	Ability to create templates to respond to students for common questions
3	Ability to track (and report/retrieve) all forms of correspondence to/from students/customers including emails, faxes, phone calls, walk-ins, cases
4	Ability to assign and re-assign cases between staff and offices; email notifications of assignment
5	Mechanism to create knowledge management articles to solve common problems
6	Integrated chatbot tool
7	Customer surveys that can be set to send automatically on case close for each case or x number of cases
8	Dashboard functionality to see cases assigned to a person, a team, status, average time to close, etc.
9	Ability to deploy preset templates when the customer submits a certain type of case (eg, perhaps for a case regarding enrollment, they would specify which term and course)
10	Ability to scale functionality to different offices and departments.
Student Success Management	
1	Automated process of reaching out to specific groups of students at various stages (e.g. attended a success event, appointments with advisors, etc.) via email campaign(s), mobile messaging, or other communication channel
2	Ability to effectively identify at risk students and manage and measure interventions with the population
3	Ability to create lists of students to track and pull reports on the list.
4	Dashboards for staff/faculty to review student success indicaters (GPA, credits completed, credits enrolled, student holds, ect) at a high level and drill down to the students.
5	Success indicator for each major on student records using analyitcs
6	Milestone tracking for students course work completion (could be a specific grade in a course relevant to a student major).
7	Student Profile view of individual student information (Enrolled courses, student holds, student notes/cases, etc)
8	Kiosk - appointment scheduling, recording student visits, tracking reasons and frequency of office visits
9	Online appointment scheduling (with student, staff, testing appointments, science learning center requirement)
10	Student Academic Progress Reports
11	Student class/schedule planner that allows a student to plan their classes for a term, allowing them to input their availability and suggesting class schedules, Allowing students to schedule directly from their plan.
Communication Tools	
1	Ability of customer / student to specify how they would like to receive communication (phone, email, etxt)
2	Ability to deliver messages via multiple channels (eg, text, email, phone)
3	Ability to display push notifications or "nudges," surveys, and checklists for certain students

4	Ability to create workflows and prefilled webforms
5	Ability to create journeys using text or email to repeatedly reach out to specific groups of students if certain conditions are met (eg, if student opens email, take a different path, if student submits a form/responds, take different path)
6	Logging of all of above forms of communication so they can be easily seen attached to a student
7	Portal for students to have links to all needed resources, including pushes or nudges
Reporting / Analytics Capabilities	
1	Predictive and historical reporting and analytics capabilities
2	Ability to perform segmentation and cluster analysis
3	No limitation on the amount/type of data for a report that can be exported from the tool
4	Export functionality to excel, xml, other tools or software
5	Availability and configurability of real-time dashboards
6	Role-based report security & ability to allow other to access personally created reports
7	Scheduling and automatic distribution of reports
Mobile Application	
1	Describe the mobile capabilities of your solution. Is it responsively designed? Can notifications be pushed to the student home page?
2	Ability to communicate/chat with end users from the mobile device
3	Ability to update and track on mobile device in real-time
4	Is there an app? Can notifications be pushed to the app? Can notifiactions pushed from the app be logged for tacking and anayltics?
System Scalability, Security, and Integration	
1	Enterprise system integration. Describe compatibility with the following: o Banner – Student Information System o WebFOCUS – Enterprise Reporting o Degree Works – Degree Audit System o Canvas – Learning Management System o Google Mail – Enterprise Email and Calendar System
2	Ability to interface and/or integrate with a broad range of third party solution providers and partners to expand the system's core abilities and update third party data directly on the prospect's record within the platform
3	How is data typically populated into the tool and updated?
4	Describe solution's API with examples of integration
5	Ability to integrate with web analytics tools, specifically Google Analytics (and integrate with the solution's reporting)
6	Ability to create and populate new fields
7	Overview of tools available to in-house developers.
8	Description of end user customization features
9	Client requirements for compatibility with common operating systems (Windows, OS X) and support for common web-browsers (IE, Chrome, Safari, and Firefox)

10	Describe the process of updating the application (security patches, functional upgrades, upgrades).
Roles & Permissions	
1	Ability to audit activity and manage permissions
2	Solution’s ability and flexibility to configure and manage roles and groups with varying degrees of access permissions, including the ability to allow certain users to view and/or update limited/specific types of records/fields
3	Ability to assign and manage roles using common industry protocols, such as LDAP or Active Directory
Technical Support Quality & Training	
1	What is the response commitment of the solution provider’s technical support team – for both system administrators and the common end-user
2	Availability of solution's technical support team and service level agreement? Include hours and days of operation, available contact methods, toll free numbers, etc
3	Types of training options available for end users of the platform
4	Quantity of technical resources needed to support
Functional / Business Support	
1	Quantity of functional / business resources needed to support
2	Consulting available bundled with purchase