## 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 (Ability to track and report/retrieve all forms of correspondence to/from students/customers including emails, faxes, phone calls, walk-ins, cases)
3. Ability to assign and re-assign cases between staff and offices; email notifications of assignment.
4. Mechanism to create knowledge management articles to solve common problems.
5. Integrated chatbot tool.
6. Customer surveys that can be set to send automatically on case close for each case or x number of cases.
7. Dashboard functionality to see cases assigned to a person, a team, status, average time to close, etc.
8. 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).
9. 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 (eg. 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 indicators (GPA, credits completed, credits enrolled, student holds, etc) at a high level and drill down to the students.
5. Success indicator for each major on student records using analytics.
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, etc).
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.
### Ability to create workflows and prefilled webforms
1. 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)
2. Logging of all of above forms of communication so they can be easily seen attached to a student
3. 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 notifications pushed from the app be logged for tracking and analytics?

### System Scalability, Security, and Integration
1. Enterprise system integration. Describe compatibility with the following:
   - Banner – Student Information System
   - WebFOCUS – Enterprise Reporting
   - Degree Works – Degree Audit System
   - Canvas – Learning Management System
   - 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
   - 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

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<tbody>
<tr>
<td>1</td>
<td>Ability to audit activity and manage permissions</td>
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<tr>
<td>2</td>
<td>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</td>
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<td>3</td>
<td>Ability to assign and manage roles using common industry protocols, such as LDAP or Active Directory</td>
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### Technical Support Quality & Training

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<tr>
<td>1</td>
<td>What is the response commitment of the solution provider’s technical support team – for both system administrators and the common end-user</td>
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<tr>
<td>2</td>
<td>Availability of solution’s technical support team and service level agreement? Include hours and days of operation, available contact methods, toll free numbers, etc</td>
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<tr>
<td>3</td>
<td>Types of training options available for end users of the platform</td>
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<tr>
<td>4</td>
<td>Quantity of technical resources needed to support</td>
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### Functional / Business Support

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<tbody>
<tr>
<td>1</td>
<td>Quantity of functional / business resources needed to support</td>
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<td>2</td>
<td>Consulting available bundled with purchase</td>
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