

Student Success – Maxient Process Guide

Early Alerts

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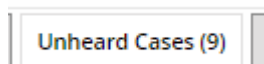
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I. Overview of Missed Meeting/Failure to Communicate Process

- A. After the Academic Advisor has made at least three attempts to contact the student and the student has been non-responsive, the process will begin. The Advisor will fill out the “Student Success – Missed Mtg/Failed to Communicate” reporting form.
 - Reporting form link:
https://cm.maxient.com/reportingform.php?MSStateUniv&layout_id=4
 - Three attempts to contact the student can consist of an email, phone call with a voicemail, and a text message to the student. These should be done within a reasonable timeframe and all three should not be completed within the same day.
- B. Once the “Student Success – Missed Mtg/Failed to Communicate” reporting form has been completed, the Dean of Students (DOS) office will receive the report. DOS will then create a case in Maxient and assign the case to the specific Advisor.
- C. When the Advisor is assigned the case in Maxient they will receive an email from the system to alert them they have received the case and prompt them to log into Maxient.
- D. The Advisor will send the “81) Student Success – Missed Appointments” letter through Maxient. When selecting this specific letter, they will be prompted to enter a deadline date. The deadline date will pull into the letter informing the student they have until that deadline to schedule an appointment with their Academic Advisor.
- E. If the student doesn’t schedule their appointment within the allotted time, the Advisor will “Ping” either the DOS office or the Office of Fraternity & Sorority Life (OFSL) within Maxient through the student’s case. This will alert DOS and OFSL to attempt to reach out to the student.
 - OFSL will be “Pinged” if the student is affiliated with a Greek organization. This is identifiable by viewing the Greek Affl. section of the Demographics tab in Maxient and viewing the Greek Affl. section.
 - If the student is not a Greek student, the Advisor will ‘ping’ the DOS office, which will be Emily Stephens.
- F. If there is a larger concern for the student, for example they mention a physical or mental health concern, harmful or troubling behavior, etc.
 - “Make a Referral” link:
https://cm.maxient.com/reportingform.php?MSStateUniv&layout_id=20

II. You are assigned a case...now what?

- A. View the Case
 - Go to cm.maxient.com/msstate
 - The case will appear on the Maxient home page under “Unheard Cases”



- Click the File ID number



- This takes you to the “Update Existing Case” screen. On this screen, you can see everything about the case and the student.

- Click “Incident”. Here you can see the incident description which is pulled from the information that was reported in the “Student Success – Missed Mtg/Failure to Communicate and/or why it was referred to our office.

B. Uploading Notes & Pings Through the Process

- A “Note” should be added to the student’s case when any action is taken on the case or there is communication with the student.
 1. Emails that are sent to the student through Maxient will be uploaded in the “EFC” so this will already be logged for the user.
- On the home page, navigate to the case by clicking on the “Unheard Cases” tab, then clicking on the “File ID”, which will take you to the “Update Existing Case” screen.
- In the “Update Existing Case” screen, you will see a grey bar across the top. Click “Notes”.

Update Existing Case

- Select “Add another note/ping” button under “Individuals Notes”.
- A box will prompt you to enter if you want to add a “Note”, “Ping”, or “Both”.
 1. When adding a note, only select “Note” and then enter in the action you have taken on the case. (Ex. On 9/27, BW reached out to the student via email. Waiting for student response. On 9/28, BW called student, went to voicemail. Waiting for student response.)
 2. When pinging either the DOS office or OFSL, you will select “Both”. By selecting both you will be prompted to “Ping” an individual from one of those offices and it will also add a note in the case to log this interaction. You must select a “Ping recipient(s)” to notify an individual
- Click the blue button labeled “Save updates” at the bottom of the screen once you have completed your note or ping.

III. Contacting the Student/Sending a Letter

You may choose to proceed by contacting the student through the Maxient system. The benefit of contacting through the system is we have a record where you attempted to reach out to the student. We can also see when the student opens the letter.

A. Sending a Letter

- Navigate to the case by going to your home screen by clicking on the “Unheard Cases” tab, then clicking on the “File ID”, which will take you to the “Update Existing Case”.
- Scroll to the bottom and click the blue button labeled “Save updates”.
- At the top of the next screen, click “Letters”.
- In the “Choose letter or form template” drop down, select the appropriate letter.

1. You will have access to “80) Student Success – Initial Mtg Request” and “81) Student Success – Missed Appointments”.
- On the “Edit your draft” tab you can make necessary edits before sending the letter. Pay attention to the office that is listed as you need to edit the letter with information regarding your office.
- Select the “Preview, send, or save” tab as you must preview it before you can send the letter.
- When the letter is ready to be sent, select the blue button at the bottom of the screen labeled “EMAIL this letter”.
- Once the letter is sent it will be view in the student’s case with in the “EFC” tab.

IV. The case is resolved, you are ready to close the case...

- A. To close the case, you will need to complete the Case Resolution Form (CRF).
 - Navigate to the case by going to your home screen by clicking on the “Unheard Cases” tab, then clicking on the “File ID”, which will take you to the “Update Existing Case”.
 1. You will ensure that notes have been added to the case
 - Scroll to the bottom and click the blue button labeled “Save updates”.
 - At the top of the next screen, click “Complete CRF”.
 - In the “I. Resolution Information” section, complete the following:
 1. For the “Resolution Type”, select “Student Success Resolution”.
 2. For the “Resolution Date”, select the date you are resolving the case. This will typically be the date you are completing the CRF.
 3. For the “Administrator 1” select yourself from the list of names.
 - In the “II. Charge/Issue and Finding” section, complete the following:
 1. For the “Finding”, select “Student Success Resolved”
 - In the “V. Rationale” section, you will need to enter in a narrative of why the case is being closed.
 1. For example: “BW met with student on 8/29/23 to discuss excessive absences. John Smith has not been going to class because he couldn’t find the classroom. We discussed the campus map feature, and he is aware of the building and classroom location now.”
 - Scroll the bottom of the page and select the blue button “Review this CRF”.
 - The next screen will show a summary of the information you entered in previous screen. If you notice any errors, you can click on the blue button labeled “Edit”. If all the information is correct, you will change the following:
 1. In the “Update the case status” drop-down, select “Closed”.
 2. In the “Set the next deadline date”, erase the deadline date listed.
 - When completed, select the blue button labeled “Finalize CRF”.

V. Reviewing the Case

- If you want to review the case to make sure you did everything correctly.
- Click find case on the left



- Type student's name
- Click the correct case
- Retrieve case
- Click the pencil

Raven Symone

SID: 902389364

File ID: 2023086201



- Click Resolution: here you can check to make sure you put the finding as student success resolved. You can also check to be sure you typed the rationale.
- Click Other: here you can check to make sure you closed the case and took out the next deadline date so it does not appear under the home screen under overdue cases.
- If you have a case that still shows up under Overdue Cases in your home screen, it is likely that you did not take out the next deadline date.

VI. Uploading to EFC

A. Need to Upload a Document

- Navigate to the case by going to your home screen by clicking on the “Unheard Cases” tab, then clicking on the “File ID”, which will take you to the “Update Existing Case”.
- Click the “EFC” tab on the grey bar.
- On the right side of the screen, click blue button labeled “Upload”.
- On the “Add file to” drop-down, select “this individual”.
- You can drag any file within the “Drop files here” box or search any file on your computer by selecting the “click to open a file browser” hyperlink.
- Click “Submit Upload”.

B. Need to Upload an Email Thread

- If you would like to upload an email thread with information regarding this student. Navigate to the case by going to your home screen by clicking on the “Unheard Cases” tab, then clicking on the “File ID”, which will take you to the “Update Existing Case”.
- Click “EFC” tab on the grey bar.
- Click the dark grey box in the top right that says “Copy File ID email address to clipboard”
- This will copy the file ID

- Go to the email thread in your email inbox that you want to upload
- Click forward
- Paste the file ID that you just copied from Maxient
- It would appear something like this:

To 2023190801+msstate@efc.maxient.com X

- Send that email
- Then after a couple of minutes when you refresh the Maxient page, the thread will appear in the “EFC” of that student’s case.