Checklist for iPASS Early Alert Technology

Below is a compilation of questions and items for institutions to consider as they set up and roll out their iPASS Early Alert technology.

# Integration and Access

* How will the iPASS software interface with the existing Student Information System (SIS), Learning Management Systems (LMS) and other systems that support students on campus?
* Will you be sending information from the SIS, LMS, or other systems, to the Early Alert (EA) system?
* Does the system integrate with the SIS and LMS out of the box, or do integration scripts need to be written? If scripts need to be written, what is the estimated load on IT?
* Can you manually upload records into the system?
* Will you need to send information from the EA System back to the SIS/LMS or any other system you are using? If so, which one?
* How often will you be sending SIS/LMS updates to the system?
* Can you create new records directly in the EA system? If so, what other systems need to be updated with this information? How often?
* Can you update and/or change existing records in the EA system? If so, can you restrict the data you may update via the EA System?
* Can you delete/sunset records that are no longer active?
* Does the system allow for single sign-on? How?
* Can you determine/restrict access to the system and certain information based on roles/personas?

# What information/settings “come out of the box” with the system?

* What do they mean? [Operational definition]
* What are their values? [Operational definition]
* Can they be modified?
* By whom [e.g., the vendor only, “super-user” at the institution, all users]?
* If by vendor, is there a charge and what is the timing?

# What settings need to be configured and how flexible is the system?

* Consider compliance with:
	+ Federal rules [e.g., FERPA, Pell]
	+ State rules [e.g., excess credits, multiple course attempts]
	+ Institutional rules [e.g., probation, dean’s lists]
* What happens to modifications when upgrades to the system are delivered?
* How often is the system upgraded/modified?

# What triggers/generates an alert?

* Can you manually raise alerts at any time?
* Does the system support automatic alerts based on new/changed data?
	+ [e.g., a GPA below a 2.00, no registration as deadline looms, new flags being raised]
	+ Are these “rules” easy to set-up?
* Does the system support alerts based on predictive models/data?
* Is there an easy way to ask/promote faculty at specific times in the semester to give feedback? For example a survey mechanism.
* Does the system allow you to raise flags for a group of students based on specific variables you can determine?
* Can the system aggregate alerts? (e.g. show when a students has more than “x” number of alerts and therefore might require immediate attention)
* Does the system allow you to give positive feedback to students?
* Does the system allow you to raise flags for a group of students based on certain criteria?
* Can students raise alerts on themselves? For example, ask for help.

# Who will be notified of an alert?

* Student, advisor, instructors, others… any combination of these?
* Can notifications be customized by persona?
* In what ways can you send alert notifications?
	+ Text, e-mail, lists for advisors, etc.?

# What actions will you take for each alert?

* What follow up mechanism will be in place?
* Can more than one person work and alert?
* Can you add a due date to an alert? (Allowing for follow-up by advisor or others if the date has passed)
* Does the system allow you to assign an alert to someone else for follow-up?
* Does the system allow you to note an alert status (e.g. “in progress”, “closed”, etc.)
* Can advisors select students by type of alerts, number of alerts and/or other criteria, in order to help with their workload? This should help your support your advising reform efforts
* What notifications can be sent once an alert is addressed?
* What notifications are sent if there is a change in the variable that caused the alert?
* Can the system – “close the loop”?
* Can alerts automatically be closed by the system if the issue is resolved?
* Does the system allow you to “bulk clear” alerts?

# What kind of reports are available out of the box with the system?

* Can reports be run by any user with permissions or only system administrators?
* Can reports be customized?
* Can the reports be downloaded?
* Can reports be printed?

# Time and effort for implementation:

* Does the system come with any pre-delivered easy HELP/ Training imbedded in the software?
* Ask for time and effort for implementing the system. Consider implementing in phases if you do not believe you can train all folks involved. If a phased implementation is considered ask your consultant how best to decide how to focus and target your Phase 1. Example: only freshman might need to then focus on only freshman courses like Intro to English/ math, OR may decide to deploy targeting developmental ed courses first.

# Who makes decisions regarding what features to deploy, establishing configurations and settings, as well as possible modifications and refinements to the system?

* Consider establishing a permanent “user group” for this purpose and controlling in some way how changes to the system can be made.