Caseload Management Proactive Efforts

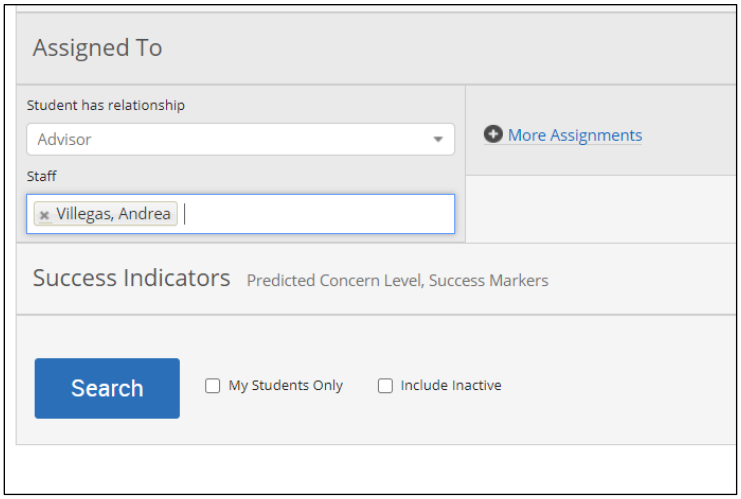
Date: 12/3/20

OVERVIEW
Advisor can use proactive measures to manage their caseloads. This document will include the use of Advanced Search, and Population Health Dashboard.

Advanced Search

Advisor's student caseload can be used in Advanced Search

- Advanced Search filters can be used to filter results for a specific student population within an Advisor's student caseload.
- Applying filters is an effective way to create Student Lists and proactive campaigns for student caseloads.



Population Health Dashboard

Advisor's Student Caseload Reports in Population Health Dashboard

- The Population Health Dashboard (PHD) is a tool to help you manage student success. Advisors can identify student populations that are most in need of interventions and track the progress of those populations.
- Select "Analytics icon" in the yellow menu side bar.

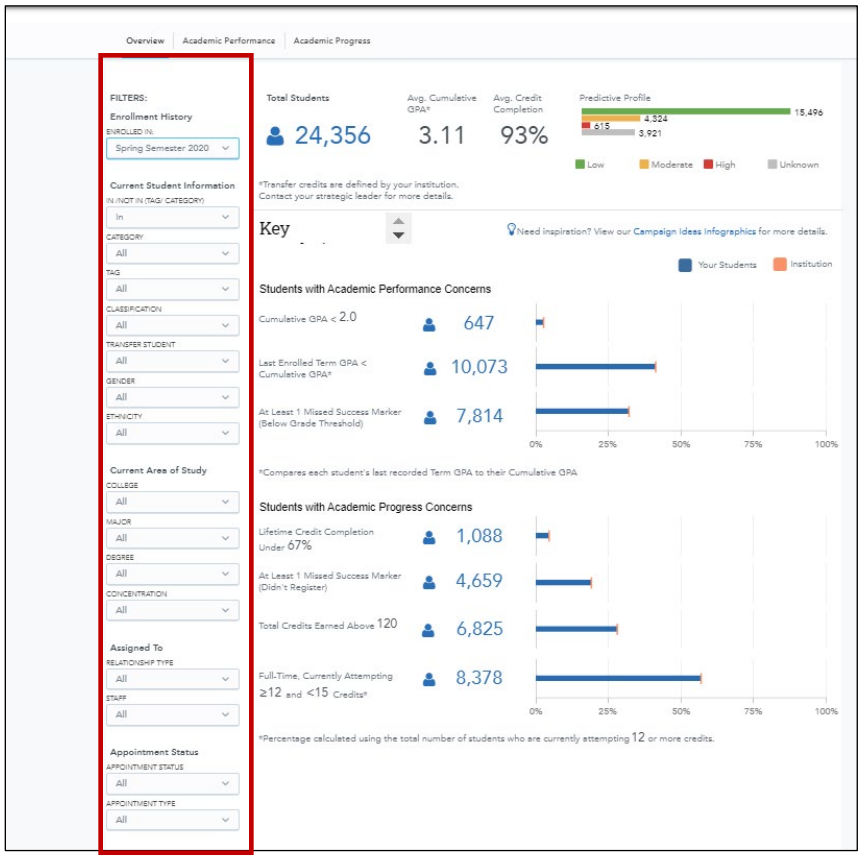


Select Population Health Dashboard



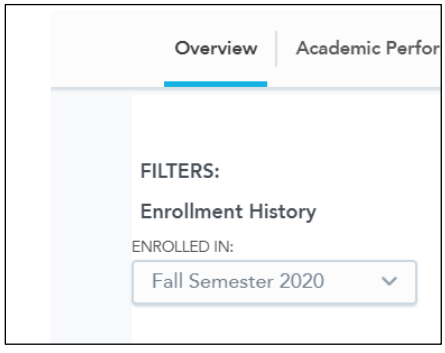
The University Overview

- This page displays key metrics to help Cal State LA identify students potentially in need of additional support.
- Most Advanced Search filters can be found to the left of the metrics. (See red box below)

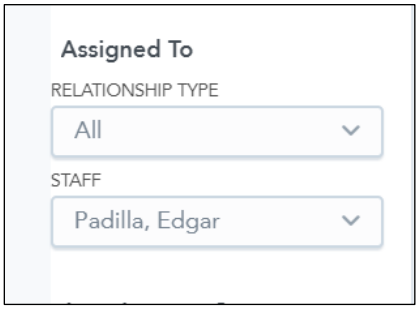


Population Health Dashboard provides reports on student caseload by term

- Select enrollment term in filter



- Select specific Advisor's Student Caseload using the "Assigned to" filter



Note: Student population lists can be exported by clicking the three dots in the right corner

- Advisors can run a campaign from that list
- Advisors can create a Student List to monitor academic progress for the specified student populations

