



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023

Proven Strategies: How To Automate Student Referrals and Close the Faculty Communications Loop

Laura Crane, Grace Fama – Washtenaw Community College

experience: **LIAISON** 

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Welcome



Laura Crane

Director, CRM Systems



Grace Fama

*Manager, Student Success
Initiatives*

Agenda



- Overview of Washtenaw Community College
- A look back at student referrals before implementing TargetX
- Success Team Referrals – User Experience
- Setting up automations with Flows
- Questions





- 2-year college in Ann Arbor, Michigan
- 19,360 total undergraduate enrollment
- 135 Associate Degree and Certificate programs

Addressing Challenges

Where our process started



- Network dependent
 - Faculty worked within their own network, and made direct referrals to staff members they had worked with in the past
- Uncoordinated across departments
 - Various departments had their own referral forms, requiring faculty to fill out multiple forms if students needed a variety of services
- No follow-up provided to faculty
 - Faculty might get a notification their referral was submitted, but they might not receive any additional information

Raising The Bar for Referrals



Requirements for our new Success Team Referral process

- Include various departments across student and academic services
- Referral form needed to be easily accessible and usable by faculty and staff, not just those with Salesforce license
- Process needed to be user-friendly for departments and staff assigned to outreach
- Maintain record of referral and subsequent engagement in CRM
- Needed to build-in automatic processes to close the feedback loop for faculty



User Experience

How faculty and staff use the Success Team Referrals



Redesigned Referral Process



Referral is linked on Faculty/Staff Dashboard



Faculty or Staff submit Referral

Assigned to Service Center based on reason(s) selected



Referral assigned to Service Center

Individual staff from Service Center are assigned as record owner



Referral assigned to staff

After referral is assigned, a confirmation email is sent to referrer, and an email is sent to assigned staff



Confirmation emails

Assigned staff reaches out to student within 1 business day, with a follow-up attempt within 1 week



Student Outreach

Assigned staff closes referral and adds referral update notes. Email sent to referrer that includes update notes

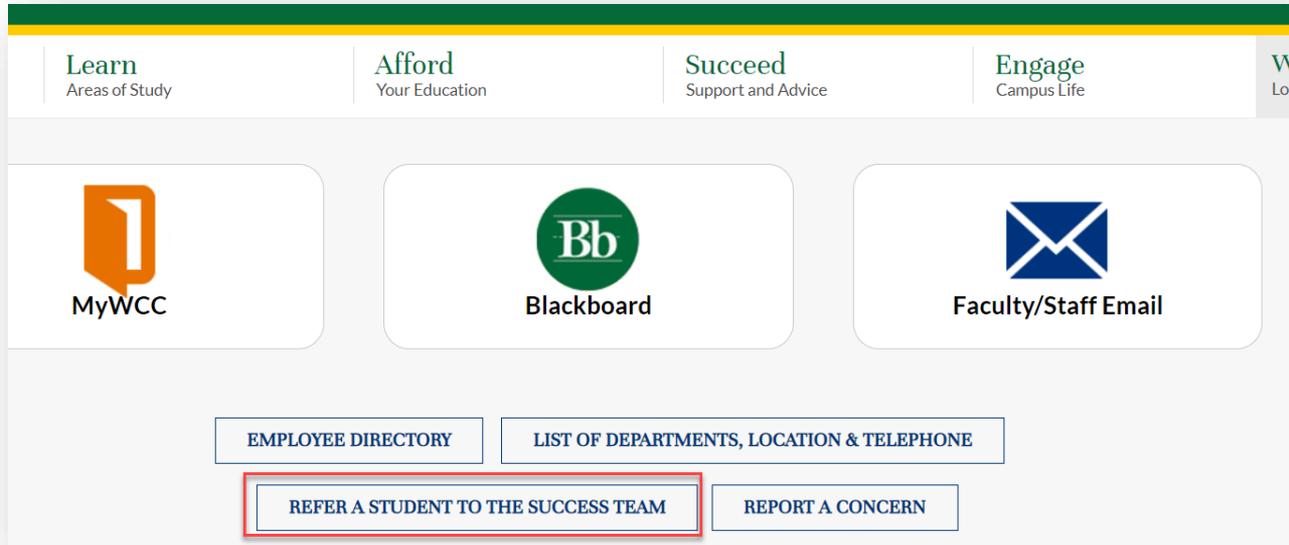


Referral Closed

Faculty/Staff Submit Referral



Success Team Referral form is centrally located on Faculty/Staff Dashboard



Submitting the Referral





Faculty/Staff Success Team Referral

The Success Team Referral form can be used by any faculty or staff at WCC to refer students who need additional assistance and support. Referrals may be for course-specific resources such as tutoring, writing assistance, and library resources, or general support such as academic success skills, academic advising, or basic life needs.

After submitting this form, you will receive an additional confirmation when the referral is assigned to a staff member for outreach.

Please note -- if you have a student who is experiencing emotional distress or other concerning behaviors, please submit a [Care Team Contact Form](#) INSTEAD of the Success Team Referral.

If there is an immediate threat or concern for the student's safety and/or well-being, call 911 or Public Safety at 734-973-3411 (x3411 from a campus phone) AND complete the [Care Team Contact Form](#).

* Denotes Required Information

Student Identifying Information

Please note, the information below is used to match to the student in our system. Both pieces of information must match or you will receive an error message.

First part of WCC Email address *

@wccnet.edu

Student's Last Name *

Reason(s) for Referral

What are the primary areas of assistance/support you would like this student to receive from their Success Team? (please check all that apply) *

- Academic Advising**
Course withdrawal/drop options, academic program requirements, academic/career exploration
- Study Help**
Tutoring, reading comprehension, test-taking strategies
- Academic Success Skills**
Time management, goal setting, balancing priorities
- Writing Support**
- Technology Assistance**
Doesn't have adequate technology, help navigating Blackboard, assistance with course-specific technology
- Academic Research Assistance**
Developing research topics, identification and evaluation of resources, using research databases
- Financial and/or Basic Needs Assistance**
- Disability Services**
Student mentioned they had an IEP/504, student has requested classroom accommodations but hasn't been working with Learning Support Services
- Other**

Please provide additional information about why you are referring this student:





Assigned to Service Center



- Based on reasons selected in the referral, email notification is automatically sent to departmental email addresses or assigned Service Center leads.



Greetings,

Please check TargetX. Your service area: Success Coaches has been assigned a new Success Team Referral.

Thank you!

Grace Fama, M.A.

Manager of Student Success Initiatives

Student Center, Room 265A

successteam@wccnet.edu

Washtenaw Community College
4800 E Huron River Dr
Ann Arbor, MI 48105-4800



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Referral Assigned to Staff



Notification sent to faculty

Notification sent to assigned staff



Hi Grace,

Thank you for submitting a Success Team Referral for Alpha WCC-TEST.

Grace Fama will be reaching out to the student.

Please let either of us know if you have additional questions or concerns.

Grace Fama, M.A.

Manager of Student Success Initiatives

Student Center, Room 265A

successteam@wccnet.edu



Greetings,

Please check TargetX for a new [Success Team Referral](#).

Student: Alpha WCC-TEST

Referral Record: A1265733

Grace Fama, M.A.

Manager of Student Success Initiatives

Student Center, Room 265A

successteam@wccnet.edu

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Student Outreach



“My Open Referrals” list view makes it easier for staff to see which referrals are still open, and which referrals need additional follow-up

	Created Date ↓	Referral - 1st Out...	Referral - 1st Outreach...	Advising	Student	Related - Serv...	Referral Resources Reques...
1	<input type="checkbox"/> 1/30/2023 10:19...			A1265734	Malorie Leogrande - ...	Success Coaches	Academic Success Skills
2	<input type="checkbox"/> 1/30/2023 9:19 ...	Sent Email	1/31/2023	A1265733	Alpha WCC-TEST	Success Coaches	Academic Success Skills

Referral Closed

•••••

After completing at least two outreach attempts, staff member closes referral and adds comments that will be sent to faculty

▼ Summary of Outreach

<p>Referral - 1st Outreach ⓘ Sent Email ✎</p> <hr/> <p>Referral - 2nd Outreach ⓘ Had Conversation ✎</p> <hr/> <p>Comments to be Emailed to Referrer ⓘ Alpha attended a success coach meeting, and we talked through their current time management strategies. Alpha is going to try using a Google Calendar to keep track of upcoming assignments ✎</p> <hr/> <p>Closed/Released? <input checked="" type="checkbox"/> ✎</p>	<p>Referral - 1st Outreach Date ⓘ 1/31/2023 ✎</p> <hr/> <p>Referral - 2nd Outreach Date ⓘ 2/1/2023 ✎</p> <hr/> <p>Closed/Released Date 1/30/2023 10:27 PM ✎</p> <hr/>
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Closing The Loop



- Faculty receive an email notification when the referral is closed, along with notes from the staff member highlighting outreach attempts and any outcomes



Hi Grace,

Thank you for submitting a Success Team Referral for Alpha WCC-TEST.

Grace Fama has closed this referral. Below is a summary of the outreach efforts. If nothing is listed, please refer to the notes below for details.

<u>Outreach Date(s)</u>	<u>Outcome(s)</u>
1/31/2023	Sent Email
2/1/2023	Had Conversation

Here is a summary of the Referral Comments:

Alpha attended a success coach meeting, and we talked through their current time management strategies. Alpha is going to try using a Google Calendar to keep track of upcoming assignments

Please let either of us know if you have additional questions or concerns.

Elements of the Build

Connecting Forms and Building Automations



Elements of the Build



- Referral Forms
- Flow Part 1 Assign Service Area
 - Sends Confirmation Email upon form submittal
 - Assigns Service Area and sends email notification
- Flow Part 2 – Assign Individual
 - Assigns referral to staff member
 - Sends email notifications to staff member and to referrer
- Flow Part 3 – Outreach Updated and/or Referral Closed
 - Updates outreach or closed dates
 - Sends email with outreach summary and comments to referrer

Referral Form – Connectors



No connectors on Part 1 – using Notifications

PART 1 FACULTY/STAFF SUCCESS TEAM REFERRAL PART 1 ▾

Connectors

Changes made to the timeline will be applied everywhere this form is published, including Workflow.

Form opened

Salesforce (Prefill)
● DISABLED

Configure Logs ▾

+ Add connector for form opening

Form submitted

Salesforce
● DISABLED

Configure Logs ▾

+ Add connector for form submission

After form submitted

Salesforce
● DISABLED

Configure Logs ▾

+ Add connector for after form submission

PART 2 TEST WCC FACULTY/STAFF REFERRAL ▾

Connectors

Changes made to the timeline will be applied everywhere this form is published, including Workflow.

Form opened

Salesforce (Prefill)
● ENABLED

Configure Logs ▾

+ Add connector for form opening

Form submitted

Salesforce
● ENABLED

Configure Logs ▾

+ Add connector for form submission

After form submitted

Salesforce
● DISABLED

Configure Logs ▾

+ Add connector for after form submission

Referral Form



- Attaches referral and follow-up to the student record in Salesforce
- First form uses Notifications to prefill data from Student Record into second form

* Denotes Required Information

Student Identifying Information

Please note, the information below is used to match to the student in our system. Both pieces of information must match or you will receive an error message.

First part of WCC Email address *

alwcctest @wccnet.edu

Student's Last Name *

WCC-TEST

PART 1 FACULTY/STAFF SUCCESS TEAM REFERRAL PART 1 ▾

Notification Options

ACKNOWLEDGMENT

EITHER SHOW THIS "THANK YOU" MESSAGE:

B *I* U                       Fields ▾ Aliases ▾ f ▾  <> 

...OR REDIRECT TO THIS PAGE:

https://washtenaw.secure.force.com/form?formid=217922&email=%tfa_406%@wccnet.edu

Referral Form



Use Unsafe parameter from first form Notifications to prefill student data into second form

PART 2 WCC FACULTY/STAFF REFERRAL (FORM ID: 217922)

Salesforce (Prefill)

STEP 2 OF 2 - CONNECTOR INSTRUCTIONS

1. Lookup Contact object

LOOKUP #1

Use this query to lookup a Contact record:

Email equals Unsafe parameter : email

Caution: Make sure to select a field that cannot be guessed. A respondent could easily change the parameter value to try to access a different record.

If no matching record is found:
Skip prefilling.

If one matching record is found:
Prefill with this record.

If more than one records are found:
Pick the most recently modified record.

FIELD MAPPING

These form fields:

Preferred Name

First Name

Last Name

Contact ID

Get their value from:

Communications First Name

First Name

Last Name

Contact ID

* Denotes Required Information

Student Information

If student name information is incorrect, please verify email and last name on previous page.

Preferred Name

Alpha

First Name

Alpha

Last Name

WCC-TEST



Referral Form - Connectors



- Lookup = Contact ID (prefilled)
- Create new Referral Advising Record

CONNECTOR INSTRUCTIONS

▼ 1 - Lookup Contact record

LOOKUP #7

Find a Contact record using:

☁ Contact ID = 📄 Contact ID

IF NO MATCH	IF ONE MATCH	IF MULTIPLE MATCHES
Skip this object and any dependent	Continue with dependent objects	Skip this object and any dependent

▼ 1.1 - Create new TgtX_Retention__Advising__c record

Create ▼ TgtX_Retention__Advisin... ▼ Tip: Missing an object? Try refreshing the list.

RELATIONSHIP

Select the *TgtX_Retention__Advising__c* field that references the parent *Contact*:

Student ▼

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Type	Formula = Success Team Referral
Referral Resources Requested	What are the primary areas of assistance/support you would like this student to receive from their Success Team? (please check all that apply)
Referral - Course Subject	Course Subject (i.e., BIO ENG, HSC, etc.)
Referral - Course Number	Course Number
Referral - Course Section	Section Number
Referrer First Name	Your First Name

Assigning Service Centers using Flow

Use 1st Flow to Assign Service Center based on Reason(s) for Referral

- Single reason selected
 - Assigned to specific areas to triage request, such as Learning Commons for ‘study help’
- Multiple reasons selected
 - Assigned to Success Coaches for triage – vast majority of referrals

Reason(s) for Referral

What are the primary areas of assistance/support you would like this student to receive from their Success Team? (please check all that apply) *

- Academic Advising**
Course withdrawal/drop options; academic program requirements; academic/career exploration
- Study Help**
Tutoring, reading comprehension, test-taking strategies
- Academic Success Skills**
Time management, goal setting, balancing priorities
- Writing Support**
- Technology Assistance**
Doesn't have adequate technology; help navigating Blackboard; assistance with course-specific technology
- Academic Research Assistance**
Developing research topics; identification and evaluation of resources; using research databases
- Financial and/or Basic Needs Assistance**
- Disability Services**
Student mentioned they had an IEP/504; student has requested classroom accommodations but hasn't been working with Learning Support Services
- Other**

Flow 1 – Assign to Service Center



Criteria

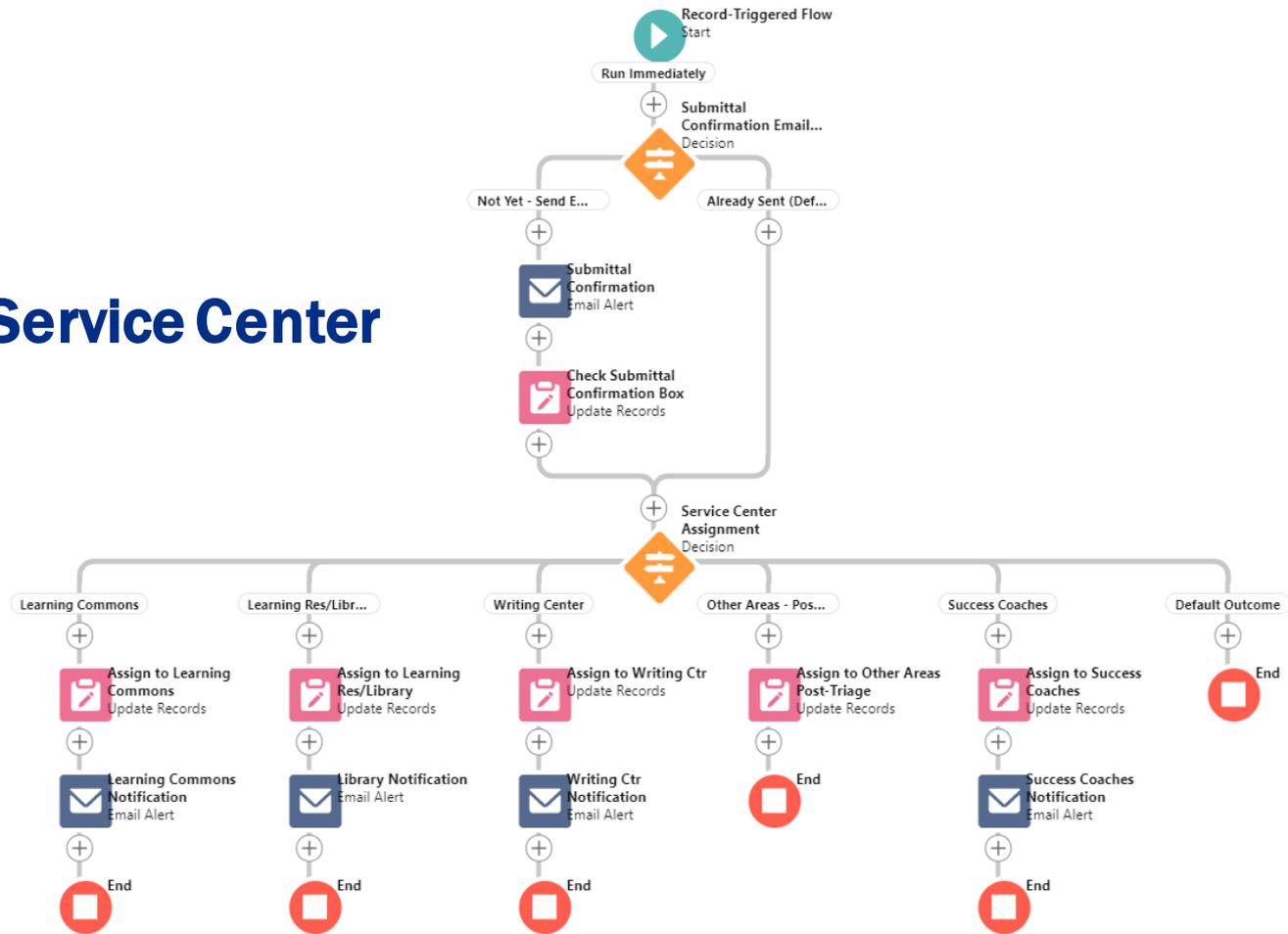
- Referral record type; created or updated

First Decision

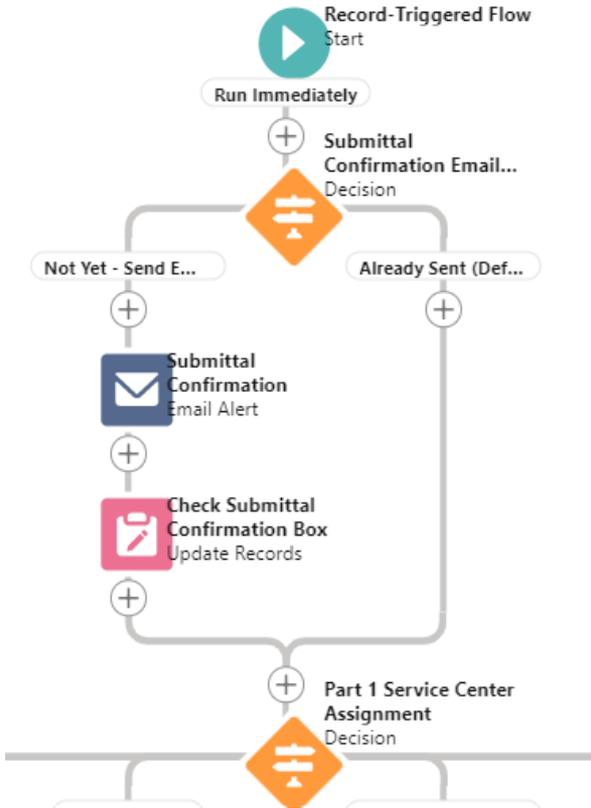
- Send confirmation email

Second Decision

- Assign to service area
- Notify service area



Flow 1- Assign to Service Center



1st Decision – Send confirmation email

Outcomes:

- Submittal Confirmation Email not yet sent
- Default – Submittal Confirmation Email already sent

Actions (only first outcome):

- Send submittal confirmation email alert to referrer.
- Update Field: Referral Submittal Confirmation Sent to *True*

Flow 1– Assign to Service Center

2nd Decision – Assign to Service Area

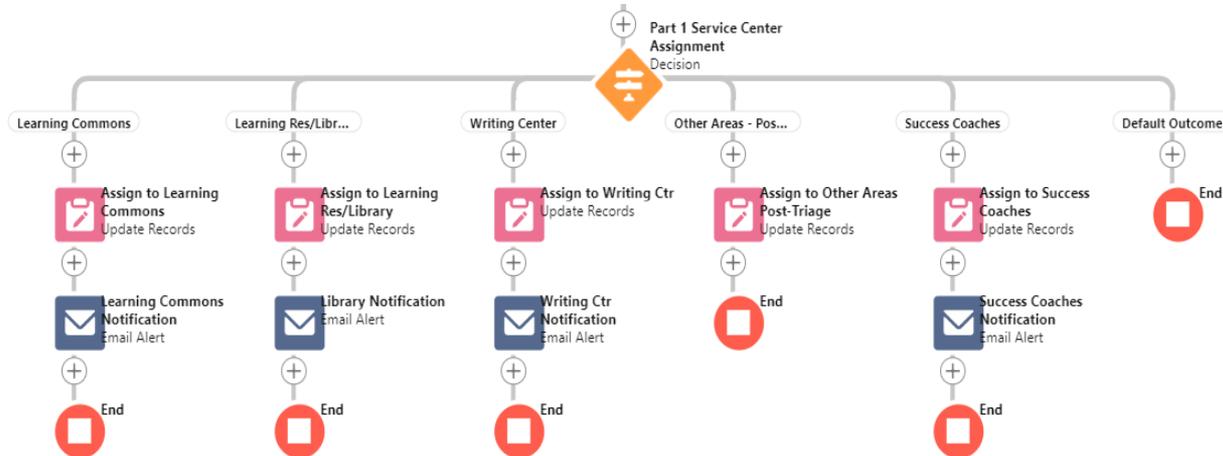


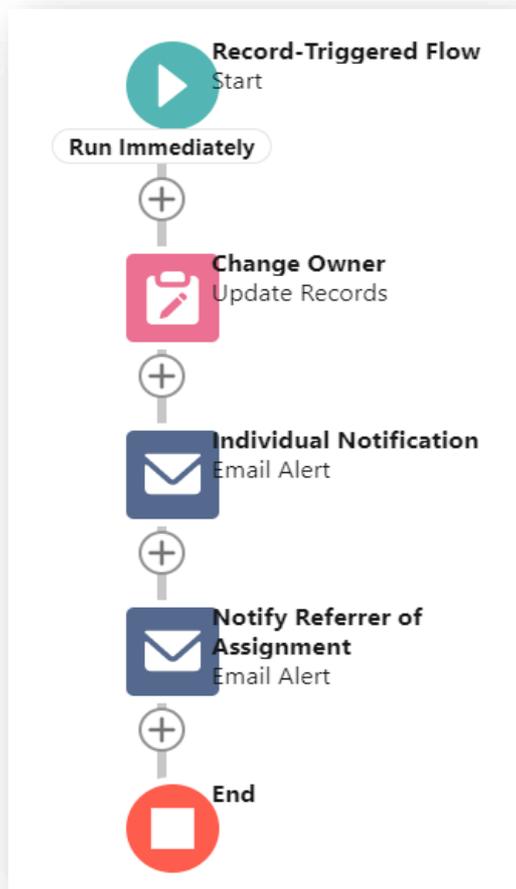
Outcomes:

- Assign to specific service area
- Success Coaches assign to individual in other service area post-triage
- All other referrals assigned to Success Coaches
- Default – referral previously assigned

Actions:

- Update Field: Related Service Center
- Send email alert to service area





Flow 2– Assign to Staff

Criteria:

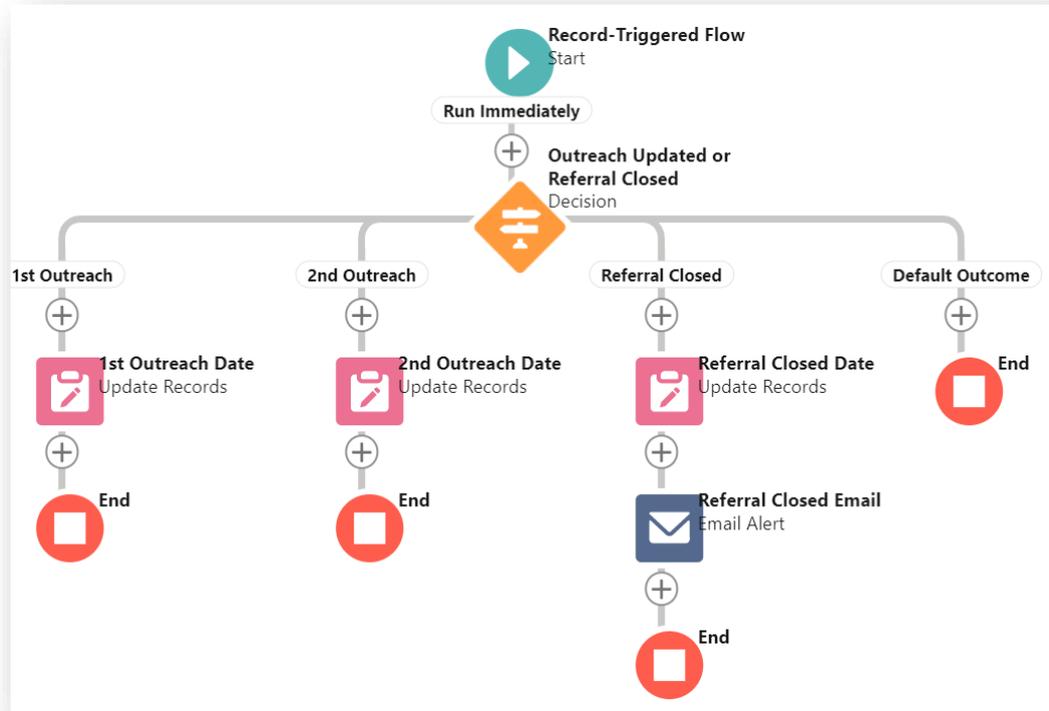
- Advising record with Record Type ID corresponds to Referral Record Type
- Field *Referral Assigned to User Is Changed* = *True*

No Decisions

Actions:

- Update Owner Id to user assigned to referral
- Send Email Alert to notify staff member assigned referral
- Send Email Alert to staff/faculty who created referral letting them know who will follow-up.

Flow 3– Update Outreach or Close Referral



Flow 3– Update Outreach or Close Referral



Criteria

Referral record type AND

- Closed = *True* OR
- 1st Outreach Is Changed *True* OR
- 2nd Outreach Is Changed *True*

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Custom Condition Logic Is Met

*Condition Logic ⓘ

1 AND (2 OR 3 OR 4)

	Field	Operator	Value
1	RecordTypeId	Equals	012f400000GGKCAA4
2	TgtX_Retention__Closed_Released__c	Equals	<input checked="" type="checkbox"/> True X
3	Referral_1st_Outreach__c	Is Changed	<input checked="" type="checkbox"/> True X
4	Referral_2nd_Outreach__c	Is Changed	<input checked="" type="checkbox"/> True X

Referral Closed



Decisions/Outcome Order

• 1st Outreach:

- 1st Outreach Is Changed *True*
- 1st Outreach Date Is Null *True*
- Closed/Released = *False*

• 2nd Outreach:

- 1st Outreach Is Changed *False*
- 1st Outreach Date Is Null *False*
- 2nd Outreach Is Changed *True*
- 2nd Outreach Date Is Null *True*
- Closed/Released = *False*

• Closed:

- Referral Closed/Released = *True*
- Referral Closed/Released Date Is Null *True*

Outreach Updated or Referral Closed (Outreach_Updated_or_Referral_Closed) 

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
1st Outreach	<p>*Label: 1st Outreach</p> <p>*Outcome API Name: X1st_Outreach</p> <p>Condition Requirements to Execute Outcome: All Conditions Are Met (AND)</p>	Delete Outcome
2nd Outreach		
Referral Closed		

Default Outcome

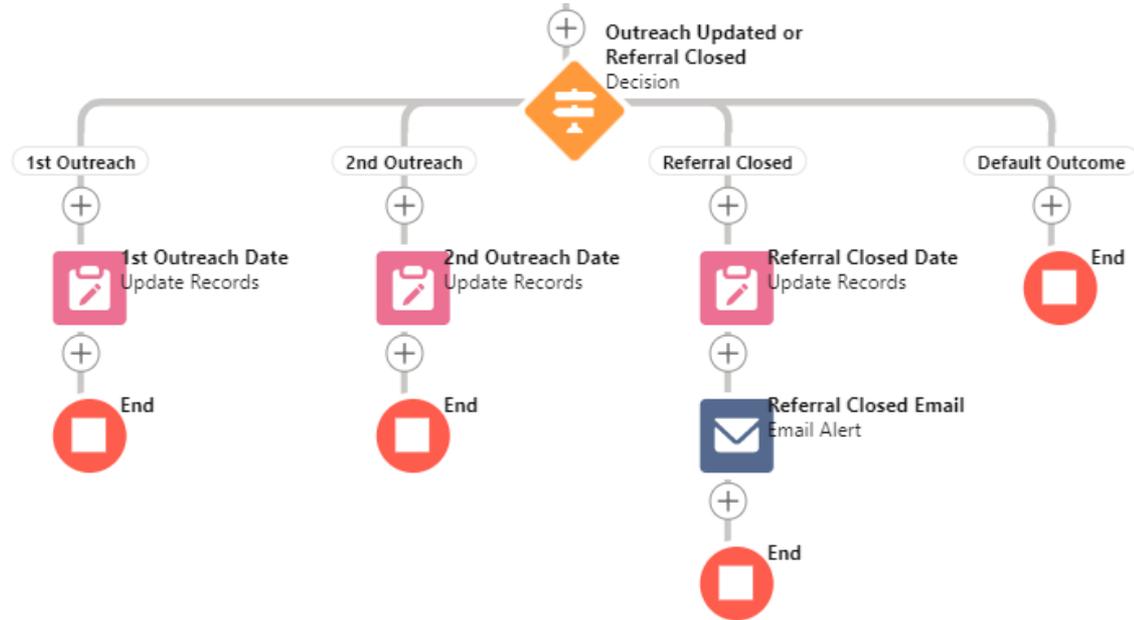
Resource	Operator	Value	
\$Record > Referral - 1st Outreach X	Is Changed	True X	
AND \$Record > Referral - 1st Outreach ... X	Is Null	True X	
AND \$Record > Closed/Released? X	Equals	False X	

Referral Closed



Actions

- Populate date of outreach or referral closed
- Send Email Alert:
 - Notify referrer of outreach efforts and dates
 - Notify referrer that referral is closed
 - Provide summary comments



Thank You



Laura Crane

Washtenaw Community College
lpcrane@wccnet.edu

Grace Fama

Washtenaw Community College
gfama@wccnet.edu

Extra Slides





Flow Part 1 Assign Service Area



Criteria for Start

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Advising

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

RecordTypeId

Operator

Equals

Value

012f400000GGKCAA4

+ Add Condition

When to Run the Flow for Updated Records ⓘ

- Every time a record is updated and meets the condition requirements
- Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Flow 1– Assign Service Center

First Decision

Submittal Confirmation Email Sent (Submittal_Confirmation_Email_Sent)

Has submittal confirmation email been sent to referrer?

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER  

-  Not Yet - Send Email
- Already Sent (Default)

OUTCOME DETAILS

* Label * Outcome API Name

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource	Operator	Value
 \$Record > Created Date 	Greater Than 	 Yesterdays_Date 
AND  \$Record > Referral - Submittal Confirmation Sent 	Equals 	 False 

 Add Condition

When to Execute Outcome 

If the condition requirements are met

Only if the record that triggered the flow to run is updated to meet the condition requirements

Flow 1– Assign Service Center

Second Decision -Single Area

[Edit Decision](#)

Part 1 Service Center Assignment (Part_1_Service_Center_Assignment) [✎](#)

Assign to Service Center based on resources requested

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS			Delete Outcome
<div style="margin-bottom: 5px;">+ ⓘ</div> <ul style="list-style-type: none"> ☰ Learning Commons ☰ Learning Res/Library ☰ Writing Center ☰ Other Areas - Post-Triage ☰ Success Coaches Default Outcome 	<p>* Label</p> <input type="text" value="Learning Commons"/>	<p>* Outcome API Name</p> <input type="text" value="Learning_Commons"/>		
	<p>Condition Requirements to Execute Outcome</p> <input type="text" value="Any Condition Is Met (OR)"/>			
	<p>Resource</p> <input type="text" value="\$Record > Referral Resources Requested"/>	<p>Operator</p> <input type="text" value="Equals"/>	<p>Value</p> <input type="text" value="Study Help"/>	✕
	<p>OR</p> <input type="text" value="\$Record > Referral Resources Requested"/>	<p>Operator</p> <input type="text" value="Equals"/>	<p>Value</p> <input type="text" value="Technology Assistance"/>	✕
	<p>OR</p> <input type="text" value="\$Record > Related - Service Center"/>	<p>Operator</p> <input type="text" value="Equals"/>	<p>Value</p> <input type="text" value="Learning Commons"/>	✕
	<p>+ Add Condition</p>			
	<p>When to Execute Outcome ⓘ</p> <p><input type="radio"/> If the condition requirements are met</p> <p><input checked="" type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements</p>			

Flow 1– Assign Service Center

2nd Decision - Other Areas

Service Center Assignment (Service_Center_Assignment)

Assign to Service Center based on resources requested

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

- Learning Commons
- Learning Res/Library
- Writing Center
- Other Areas - Post-Triage
- Success Coaches
- Default Outcome

OUTCOME DETAILS [Delete Outcome](#)

* Label * Outcome API Name

Condition Requirements to Execute Outcome

	Resource	Operator	Value	
	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Academic Advising	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Career Services	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Counseling Center	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	International Student Center	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Learning Support Services	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Student Resources Center	
OR	<input type="text" value="\$Record > Related - Service Center X"/>	Equals	Veterans Center	

Flow 1– Assign Service Center

2nd Decision

- Success Coaches

Service Center Assignment (Service_Center_Assignment)

Assign to Service Center based on resources requested

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER  +

-  Learning Commons
-  Learning Res/Library
-  Writing Center
-  Other Areas - Post-Triage
-  Success Coaches
- Default Outcome

OUTCOME DETAILS Delete Outcome

*** Label**

*** Outcome API Name**

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource	Operator	Value
 \$Record > Related - Service Center X	Is Null 	 True X 

+ Add Condition

When to Execute Outcome 

If the condition requirements are met

Only if the record that triggered the flow to run is updated to meet the condition requirements

Flow 1– Assign Service Center

2nd Decision Actions - Assign Service Area

Edit Update Records

Update Salesforce records using values from the flow.

Assign to Learning Commons (Assign_to_Learning_Commons) 

*** How to Find Records to Update and Set Their Values**

- Use the advising record that triggered the flow
- Update records related to the advising record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value	
TgtX_Retention_Related_	Does Not Equal ▾	Learning Commons	

+ Add Condition

Set Field Values for the Advising Record

Field		Value	
TgtX_Retention_Related_Service_Center_	←	Learning Commons	

+ Add Field

Cancel
Done

Flow 1– Assign Service Center

2nd Decision Actions

- Email Alert to Area

Edit "Referral Notification - Learning Commons" email alert

Use values from earlier in the flow to set the inputs for the "Referral Notification - Learning Commons" email alert. To use its outputs later in the flow, store them in variables.

Learning Commons Notification (Learning_Commons_Notification) 

Set Input Values

A_a *Record ID



Flow 1– Assign Service Center

2nd Decision Actions - Email Alert to Area

 SETUP **Email Alerts**

Email Alert
Referral Notification - Learning Commons

[« Back to List](#) | [Source to Master Objects](#)

[Rules Using This Email Alert \[0\]](#) | [Approval Processes Using This Email Alert \[0\]](#)

Email Alert Detail

[Edit](#) [Delete](#) [Clone](#)

Description	Referral Notification - Learning Commons	Email Template	STR - Service Center Assignment
Unique Name	Referral_Notification_Learning_Commons	Object	Advising
From Email Address	"WCC Success Teams" <successteam@wccnet.edu>		
Recipients	User Joyce Hommel User David Schuit		
Additional Emails	ljcrane@wccnet.edu successteam@wccnet.edu		
Created By	Laura Crane , 10/21/2021 9:26 AM	Modified By	Laura Crane , 2/3/2023 10:06 AM



Referral Communications

Merge fields from Referral record.

Related	Details	
Record Type	Referral	
Type	Success Team Referral - Primary	
Advising	A1265733	
Advisor (Current)		
Coach		
Banner ID		
Communications First Name	Alpha	
Last Name	WCC-TEST	
Student	Alpha WCC-TEST	
Email (Student)	alwctest@wccnet.edu	
Assignment Details		
Related - Service Center	Success Coaches	
Referral - Assigned To (User)	Grace Fama	
Referral Details		
Summary of Outreach		
Referral - 1st Outreach	Sent Email	
Referral - 1st Outreach Date	1/31/2023	
Referral - 2nd Outreach	Had Conversation	
Referral - 2nd Outreach Date	2/1/2023	
Comments to be Emailed to Referrer	Alpha attended a success coach meeting, and we talked through their current time management strategies. Alpha is going to try using a Google Calendar to keep track of upcoming assignments	
Closed/Released?	<input checked="" type="checkbox"/>	
Closed/Released Date	1/30/2023 10:27 PM	



Hi `{!TgtX_Retention__Advising__c.Referrer_First_Name__c}`,

Thank you for submitting a Success Team Referral for `{!TgtX_Retention__Advising__c.TgtX_Retention__Student__c}`.

`{!TgtX_Retention__Advising__c.Referral_Assigned_To_User__c}` has closed this referral. Below is a summary of the outreach efforts.

Outreach Date(s)

`{!TgtX_Retention__Advising__c.Referral_1st_Outreach_DATE__c}`
`{!TgtX_Retention__Advising__c.Referral_2nd_Outreach_DATE__c}`

Outcome(s)

`{!TgtX_Retention__Advising__c.Referral_1st_Outreach__c}`
`{!TgtX_Retention__Advising__c.Referral_2nd_Outreach__c}`

Here is a summary of the Referral Comments:

`{!TgtX_Retention__Advising__c.Comments_to_be_Emailed_to_Referrer__c}`

Please let either of us know if you have additional questions or concerns.

Grace Fama, M.A.
Manager of Student Success Initiatives
 Student Center, Room 265A
successteam@wccnet.edu



Referral Communications

Email Alert Details

Email Alert
Referral Closed Notification
[« Back to List: Source to Master Objects](#)

[Rules L](#)

Email Alert Detail Edit Delete Clone

Description	Referral Closed Notification
Unique Name	Referral_Closed_Notification
From Email Address	"WCC Success Teams" <successteam@wccnet.edu>
Recipients	Email Field: Referrer Email
Additional Emails	ljpcrane@wccnet.edu successteam@wccnet.edu
Created By	Laura Crane , 10/26/2021 10:57 AM

Edit Delete Clone

Edit Email Alert
Referral Closed Notification
Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any mc

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description: Referral Closed Notification
Unique Name: Referral_Closed_Notification
Object: Advising
Email Template: STR - Referral Closed Notifi

Recipient Type: Search: User for: Find
This search is too broad. Refine your search criteria and try again.

Recipients

Available Recipients	Selected Recipients
User: Aaron Anderson User: Abike Martins User: Alexander Long User: Alexi McCracken User: Alisha Noel User: Amanda Deacon User: Amber Wagner User: Amy Carpenter User: Amy Wiseman User: Andrea Wilseck User: Andrew Munguia User: Ann Herbert User: Anne Stevenson User: Ashley Bernstein	Email Field: Referrer Email

Add
Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails: ljpcrane@wccnet.edu
successteam@wccnet.edu