E26

AI ENGAGE FALL SUMMIT

ONLINE EVENT

The Evolution of Case Management and Advising

From traditional student support to the agentic campus

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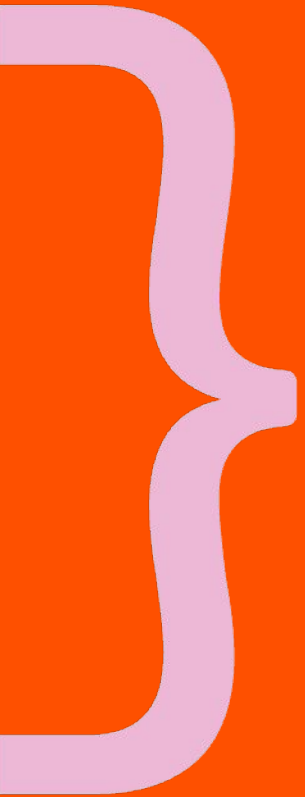


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Students don’t fall through the cracks because no one cares. They fall through because you can’t keep up.

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Detection was never the hard part

300:1

- Average advisor caseload: 286 at public four-year, 319 at public two-year.[1]

93%

- of two- and four-year institutions already run an early alert system.[2]

<50%

- of flagged students are successfully contacted, where institutions have measured it.[3]

Sources: [1] Tyton Partners, Driving Toward a Degree, 2025. [2] Gardner Institute, 2012. [3] Hanover Research, 2017.

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From Early Alerts to Early Success

	Detection	Coordination	Outreach
Traditional	Faculty notice a struggling student and submit a referral, often after midterms	Advisors triage referrals by hand from inboxes and spreadsheets	Advisors reach out when time allows; many students never hear back
Early alert	Rules flag grades and attendance pulled from the SIS and LMS	Alerts pile into a queue for advisors to sort and assign	Still manual, so speed and coverage depend on staff capacity
Agentic with Element451	SIS and LMS data sync continuously; Agent spots warning signs as they appear	Agents route each case: the agent handles it or hands off to the right advisor	The agent reaches out right away with next steps; advisors focus on complex cases

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Alerts vs. Cases

Two objects, two different jobs

ALERTS | THE SIGNAL

- One-time signal that something happened—a missed class, grade drop, or wellbeing concern
- Reviewer triages + makes the call
- Triage → In Progress → Resolved / Dismissed / Escalated to Case
- Custom types, priorities, templates

CASES | THE WORK

- The ongoing work to resolve a student's issue — the system of record
- An Assignee owns it; Subscribers follow for awareness
- Container: Alerts, Tasks, Conversations, Appointments, Documents, Bolt Agent Jobs & a related course
- Custom statuses, types, priorities, templates

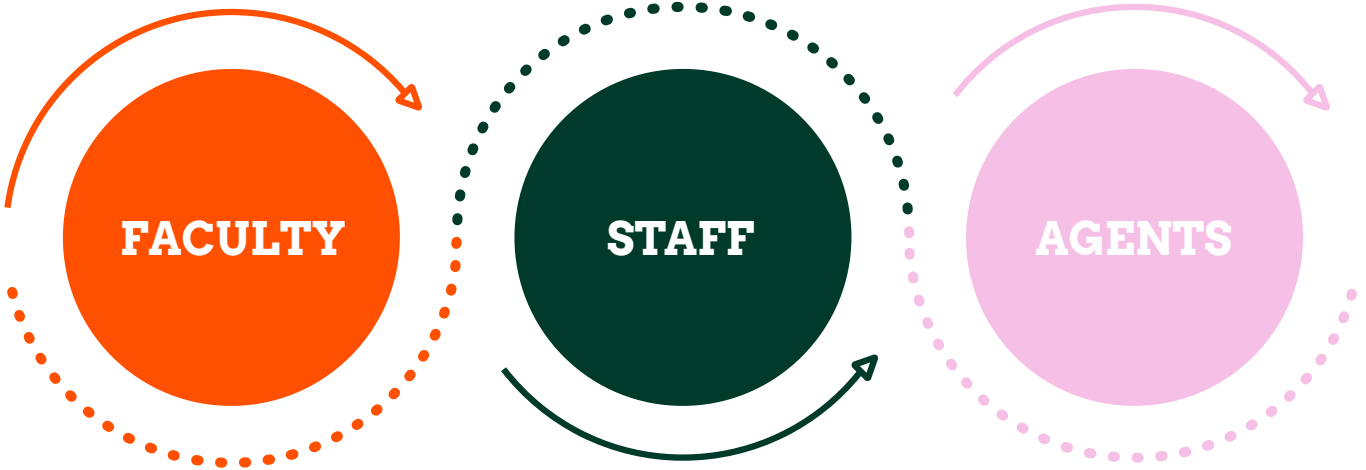
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Does this need a decision, or does it need a plan?

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One Goal: Supporting Your Students

One team, rallying around every student



Flag it from the classroom

Triage, own & resolve the case

Handle the routine outreach

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Agents Read the Case First

On every case, automatically—three sections that refresh as the case changes

Case Summary

- What's happening right now
- 1–3 sentences — leads with the most relevant signal

Student Context

- Only the signals that matter for this case
- Engagement, holds, academic standing, other open cases, sentiment

Next Steps

- 1–4 prioritized, specific actions
- Act on each right from the case — auto-marked complete

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Put an Agent on the Case

Bolt Agent Jobs, working inside the case



Enroll

Kick off a job right from the case, or automatically via a rule



The agent works

Drafts outreach, schedules check-ins, and contacts the student with full case context



You're in control

Approvals route to the case assignee, and it escalates to a human the moment judgment is needed

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One student, end to end

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What you are about to see

1. A sliding grade raises an alert
2. Triage it, then escalate to a case
3. It routes to that student's advisor
4. Bolt briefs it; act on a next step
5. An agent handles routine outreach
6. Three weeks on: the full timeline

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What it takes to make this real

What this looks like in practice

Attendance

- Alert, then a case.
- Faculty raise it from the Portal.
- A rule routes it to that student's own advisor.

Disengagement

- Alert only.
- An agent runs the outreach.
- A case opens only when a human is actually needed.

Wellbeing

- Alert, then a private case owned by counseling.
- The same rule marks it private the moment it opens.

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Where teams get this wrong

Escalating Everything

- Not every alert needs a case.
- Triage is the point.
- Over-escalating buries the work that genuinely needs an owner.

Too Many Types

- Types drive routing, visibility and reporting.
- Start with the defaults.
- Add one only when it changes who acts.

The Threshold Trap

- A rule set to “3 or more alerts” never fires.
- It evaluates before the student joins that segment.
- Use a workflow.

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Get every case to the right person

To the advisor

- The alert goes to that student's own advisor, automatically.
- Or to whoever already owns the relationship.
- A fallback means nothing ever lands unassigned.

Across the team

- Rotational assigns round-robin.
- Balanced assigns to the lightest workload.
- One rule replaces a rule per advisor.

To the right team

- Case types set who sees what: Financial, Wellbeing, Conduct.
- Visibility groups narrow it by student, such as nursing only.
- Wellbeing cases can be marked private when they open.

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FACULTY ACCESS

They notice first

Faculty see the missed assignments and empty seats before anyone else. Give them an easy way to tell you.

They flag it fast

A simple portal, not the full CRM. Find the student, send the alert, and get back to class.

They stay updated

Updates arrive as staff follow up, so faculty know their alert mattered and keep sending them.



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Where AI helps, and where it hurts

Where it helps

- Bolt summarizes each case and suggests next steps before you open it.
- Agents handle routine check-ins, so advisors have time for students who need a person.
- The assigned advisor approves what goes out.

Where it hurts

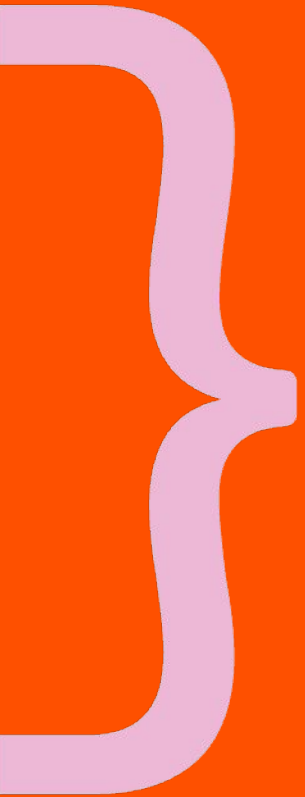
- Alerts that trigger on everything teach staff to ignore them.
- Ignored alerts are worse than no system: the risk looks covered when it isn't.
- Generic automated outreach can push students away; a personal touch keeps them engaged.

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Preparing for Agentic Case Management

People and access	Will faculty and staff use the Portal? If not, how will they submit alerts? Who can see sensitive cases?
Workflow and ownership	Who triages, and how fast? What turns an alert into a case? How do referrers hear what happened?
Data and reporting	Is SIS and LMS data syncing? What will leaders report on? Do your types support those reports?
Agents and automation	Which steps can an agent own? Where does a person always step in? Does agent outreach need approval?
Change management	Who owns this after launch? How will you train staff and faculty? Why is it worth their time?

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AI does the legwork. You make the calls.

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Thank You

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