



## Student Success & Engagement Maintenance Checklist Ideas

SS&E Maintenance Committee	Notes	Date
Committee meets regularly, with appropriate membership (may need IT person and representatives from different roles)		
New Features	Notes	Date
New Release notices are being received and associated actions taken as needed		
Appropriate features are enabled		
Datafeeds	Notes	Date
Datafeeds are loading as expected		
Health of System email contact is correct		
Any new datafeeds required for new releases are in place		
Support Tickets	Notes	Date
Tickets are being created when needed		
Tickets are followed up on with results reported		
Roles, Permissions & People	Notes	Date
Role permissions are appropriate and up to date		
People assigned to roles are appropriate		
People who are no longer with the institution are deactivated		
Notes	Notes	Date
Notes operate as expected		
Time to edit Notes is set appropriately		
Appropriate roles have access to specific Note types		
Note types are sufficient		



<b>Alerts</b>	<b>Notes</b>	<b>Date</b>
Alerts operate as expected		
Alerts are closed as needed		
Appropriate roles have access to specific Alerts		
<b>Reports &amp; Dashboards</b>	<b>Notes</b>	<b>Date</b>
Appropriate roles have access to Reports & Dashboards		
Users with access have needed reports & useful dashboards (reports can't be shared)		
<b>Predict</b>	<b>Notes</b>	<b>Date</b>
Outreach scheduled on a regular basis using Predict indicators		
Appropriate roles can view Predict indicators		
<b>Messaging</b>	<b>Notes</b>	<b>Date</b>
Roles have appropriate groups for messaging		
<b>Tags</b>	<b>Notes</b>	<b>Date</b>
Review all tags, especially manual to ensure they are working as expected		
Review new tag requests and what type is needed (data backed, filter, manual)		
Appropriate roles have tag access		
<b>Relationships &amp; Caseloads</b>	<b>Notes</b>	<b>Date</b>
Review relationships and make sure they are updated		
Review caseloads		
<b>Other</b>	<b>Notes</b>	<b>Date</b>
Surveys/feedback from users planned; analyzed on a regular basis		
Training Plan is in place/planned		



Best practices: Consider auditing your SS&E instance on a regular basis. If time permits, gathering feedback at the end of each term from your end users will allow for timely edits and additions to your platform. Minimally we suggest requesting feedback and planning for changes once every year. Most campuses have found it convenient to make changes between terms, especially in a summer term or prior to the start of the new academic year.

Offering refresher training at the beginning of each academic year is beneficial to introduce new features, requirements, concepts as well as reminders of usage and best practices that were previously trained. Access the [Watermark Academy](#) for information on additional training opportunities.

You may also review your SS&E reports throughout the year to identify any trends or issues with different features. For example, you can create or access reports on Alerts, Roles and other features depending on the access assigned to your role. See the following links for useful report information: [Reports Administration](#); and [Reports Overview](#)