Student Question Handoff Workshop

Someone on the Other End

A working packet for student support teams

Choose one student question and follow it until a staff member accepts responsibility and the student has a verified next step. Use the worksheets to see where time passes, what was promised, and what evidence supports the answer.

What you will leave with

- A trace of one question, with an accountable owner at each handoff
- A next step the student can explain, including who will follow up and when
- One small process change to test and review during the coming week

Start small and protect the student

For a workshop, use the fictional case on page 2 or a de-identified case that your team is authorized to review. Keep real names, student IDs, transcripts, and other education-record details out of shared workshop copies. Record evidence locations only in approved systems.

These are proposed practices for local adaptation, not institutional policy, a service-level standard, or legal advice. Set response commitments with the people who must meet them. The packet does not prescribe a benchmark response time.

Choose your route

Pages	Use
2	Read the fictional worked example together
3–4	Trace one question and record the handoff
5	Test a chatbot or CRM path through to a human
6–7	Choose a weekly change, review sources, and reflect

Before you begin: name a facilitator, a recorder, and someone who can confirm how the receiving team actually accepts work.

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Follow Lena through the handoff

Fictional worked example. Lena is a 29-year-old working transfer student. Every person, record, date, time, promise, and outcome below is invented for practice.

“My credits transferred. Why does my plan still show this requirement, and what should I register for?” Lena needs to know how accepted credit applies to her intended major. Credit acceptance and degree applicability can be separate questions. [1] Ask the receiving institution to confirm the actual decision; an early planning result may be provisional. [2]

Time and elapsed	Event and owner	Evidence and promise
Wed Oct 14 9:05 a.m. 0 min	Intake Service desk records Lena’s question and desired registration decision.	Case L-01 opened. Staff promise an ownership update by noon, even if the answer is pending.
9:20 a.m. 15 min	Handoff requested Service desk asks advising to take the case; the desk still owns follow-up.	The request includes the question and an approved record reference. Sending the request is not treated as acceptance.
10:10 a.m. 1 hr 5 min	Ownership accepted Jo, the assigned advisor, acknowledges responsibility.	Acceptance recorded. Jo tells Lena she will review the degree evaluation and send an update by 3 p.m.
11:40 a.m. 2 hr 35 min	Evidence reviewed Jo checks the fictional credit evaluation and degree plan.	The example record lists elective credit. Whether it meets the major requirement remains unresolved; the department must review it.
1:25 p.m. 4 hr 20 min	Next step offered Jo requests department review and books a planning appointment for Thu Oct 15 at 10 a.m.	Jo names the pending decision and commits to an update Thursday at noon, even if review is unfinished.
1:50 p.m. 4 hr 45 min	Next step confirmed Lena confirms she knows what is pending and when she will hear back.	Next step resolved. Case stays open until the applicability question is answered and communicated.

Read the clock carefully: 65 minutes from intake to accepted ownership; 50 minutes from handoff request to acceptance. These are fictional elapsed times, not targets. All times use the same local time zone.

Discuss before using your own case

Where could Lena have been left waiting without an owner? What evidence would justify closing the case? If review is still pending at Thursday noon, who updates Lena?

Capture the question and the promise

Blank worksheet. Work from the student's question, then identify the decision or next step the student needs. Use a de-identified case label in workshop copies.

Case label _____ Review date _____ Recorder _____

What is the student asking in their own words?

What decision or next step would help them now? What deadline matters, and why?

First received date and time _____ Time zone _____ Channel _____

Who owns follow-up now? Name or role, team, and approved contact route

What is already verified? Record the source, date checked, and approved evidence location

What remains unknown or needs an authorized decision?

What did we promise the student? Include a date, time, time zone, channel, and update owner

Suggested check: Can the student say who is helping, what happens next, and when they will hear back? If not, make the next communication clearer.

Make the handoff visible

Blank worksheet. Record receipt, requested transfer, accepted ownership, and the next verified step. Use exact timestamps when available; mark estimates explicitly.

Case label _____ Time zone _____

Date and time	Event and owner	Evidence or promise

Clock convention: use total elapsed time from intake, including waiting. If you also track working hours, record the local calendar and calculate that separately.

Time to accepted ownership _____ Time to confirmed next step _____

Receiving staff member or role _____ Acceptance timestamp _____

What proves the receiving owner accepted the work? Where is that evidence recorded?

Where did the student repeat details, or a completed status get ahead of the actual work?

Exception or delay _____ Escalation trigger _____ Escalation owner _____

What update will the student receive if the promised answer is not ready? Who sends it, and when?

Next step confirmed _____ Remaining question and owner _____

Closure decision: [ ] Open [ ] Next step confirmed, case still open [ ] Fully resolved
Evidence for that decision _____

Test the path to a human

Proposed chatbot or CRM test. Use a test account and fictional information. Follow local testing permissions and privacy rules; do not paste a real student record into an unapproved tool.

System and channel _____ Version or configuration _____ Test date _____

Test prompt: “My transfer credit appears in my record, but I cannot tell whether it meets my major requirement. I need a person to help me decide my next step.”

Mark each result as observed, missing, or not tested. A route to an inbox or a generated ticket alone does not establish that a staff member accepted the case.

What to test	Result and evidence	Staff owner or fix
Ask for a person Can the student request human help and find an accessible alternative?		
Reach a staffed route Where does the request land? Who is accountable for that queue?		
Confirm acceptance Can you verify a named staff member or accountable role accepted it?		
Carry the question forward Does authorized context reach the staff member without unnecessary record copying?		
Give a usable promise Does the student know the next step, update time, and contact route?		
Exercise an exception What happens after hours, on a missed promise, or when the tool cannot answer?		

Test timestamps: request _____ staff acceptance _____ elapsed _____

Who will act on a failed handoff? Name, contact route, and trigger

Before wider use: verify the human route with the receiving team. Have an accountable owner decide whether to repair, limit, or pause the affected workflow under local policy. This test is a workshop exercise, not a compliance certification.

Choose one change for the week

Blank action plan. Start with an observed break in the handoff. Choose a change within your team's authority and define what evidence will tell you whether it helped.

Week of _____ Team _____ Review meeting date _____

What did we observe? Include the case or test evidence, without identifying a student

What one change will we test, and which part of the student's path should it improve?

Action or check	Accountable owner	Due date and time
Prepare the change		
Confirm the receiving team is ready		
Run the agreed test		
Review evidence and decide		

What will we compare? Define the clock, evidence, and cases included before the test

What would make us stop, escalate, or change the test? Who decides?

What will we tell staff and students if the test affects an existing promise?

At the review

Decision: [ ] Continue [ ] Adjust [ ] Stop [ ] Gather more evidence
Reason and evidence _____
Next owner and review date _____

Keep the claim modest: record what you observed in these cases. Do not present a small local test as proof of improved persistence, retention, or graduation.

Sources and final review

Source notes support the context. The worksheets, test steps, ownership definitions, and action plan are original proposed practices for local adaptation.

1 Transfer credit and degree requirements

Navigating Transfer in Washington Student Experiences Barriers and Supports

Davis and colleagues, University of Washington Community College Research Initiatives and Washington Student Achievement Council, September 2026. Executive summary, pp. 1–2. Interviews with 20 students describe credit-applicability and advising barriers. This qualitative study does not estimate their statewide prevalence.

https://wsac.wa.gov/sites/default/files/2026.09-Navigating.Transfer.in_.WA-Executive.Summary.pdf

2 Planning information and official decisions

NCICU Transfer Pathways Frequently Asked Questions

North Carolina Independent Colleges and Universities. The FAQ about an evaluation that looks wrong distinguishes the platform's planning evaluation from an official transfer decision and directs students to the receiving institution's registrar or transfer advisor. Use local policy to identify the decision authority for your case.

https://ncicu.org/transfer-pathways/

3 A human route in a chatbot pilot

Piloting a Customized Chatbot to Increase College and Financial Aid Awareness

Kukreja and Deane, Washington Student Achievement Council, July 2026, pp. 1–3. The five-partner OtterBot pilot includes local branding, locally relevant information, and escalation to community contacts. The brief describes a design and intended outcomes; it does not establish enrollment gains or that the tool uses generative AI.

https://wsac.wa.gov/sites/default/files/OtterBot.Pilot-Piloting.a.Customized.Chatbot.pdf

Before your team leaves

- Name the owner of any question that is still open
- Check that the student-facing promise matches the staff-facing commitment
- Record the next review time and the evidence the team needs to bring

What will we do differently when the next student asks for help?

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