Navigate: Case Management

1. Once you have logged in to Navigate, click on the **Cases** feature located on the left-hand menu bar.
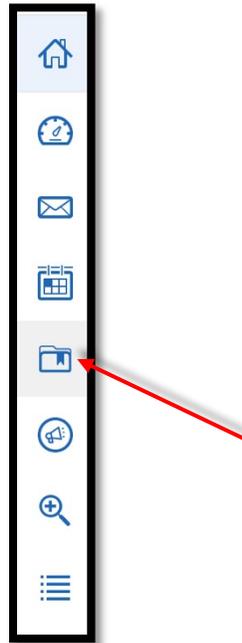
2. You will now see a full list of the **Cases** currently open and assigned to you.

3. To add comments to a **Case**, select the **Manage Case** button found on the right-hand side, next to each individual case.
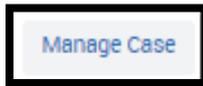
Manage Case

4. A **Manage Case** form will now appear on your screen with any information or comments added by the **Case** issuer.

MANAGE CASE   ✕

Lydia Stuart
Reason: Training Purposes Only

Owner
Select an owner ▼

Assignees
✕ Christina Foreman

Discard   Save Changes

Case Activity:

09/08/2022

↗ Christina Foreman assigned case to Christina Foreman.   09:01AM

▪ Christina Foreman opened case.   09:01AM

💬 Christina Foreman added comment: 09:01AM

01/12/2023

💬 Christina Foreman added comment: 12:49PM
    This is a case used for training purposes only.

Add Comment

cancel   Close Case

5. Next, click the **Add Comment** button to add information to your assigned **Case**. (Please Note: information should be added as it relates to <u>attempted contacts</u> and methods, and <u>any conversations</u> had with the student regarding the issue comments. These conversations may be in-person, phone, video conference, or email. **Cases** may be updated multiple times.)

This is how to add a comment.

Add Comment

6. To close a **Case**, please select the **Close Case** button found on the bottom right corner of the **Manage Case** form.

7. Choose an **Outcome** for your assigned **Case**, this is the reason you are closing the **Case**.

Case Outcomes include:
- **Alert Resolved –** the issue is resolved with the student.
- **Student Contacted, Alert Discussed –** discussed and developed a plan to resolve the issue with the student.
- **Student Non-Responder –** tried to contact the student three times, through three methods (if available), over the course of two weeks.
- **Relevant Campus Resource(s) Notified –** referred student to another campus office/resource for additional support.
- **Follow-Up Not Necessary –** alert is already being handled by the issuer or other campus partner.

8. Then, add a brief comment summarizing why you have closed this **Case** (to allow the alert issuer to see the **Case** closure comments, click the checkbox next to **Allow closed comments to be shown in email**).

9. Finally, click the **Submit** button in the bottom right corner. (Please Note: all **Cases** not closed at the end of each academic term will be automatically closed with the **Outcome** reason of "Semester Ended – Unsure if Successful Contact Was Made.")

To close multiple open cases for the same student:

1. Sort your list of assigned **Cases** alphabetically by student.

2. To close the open **Cases** for a particular student, select all of the checkboxes next to their name.

3. Click on the **Actions** button, then select **Close**.
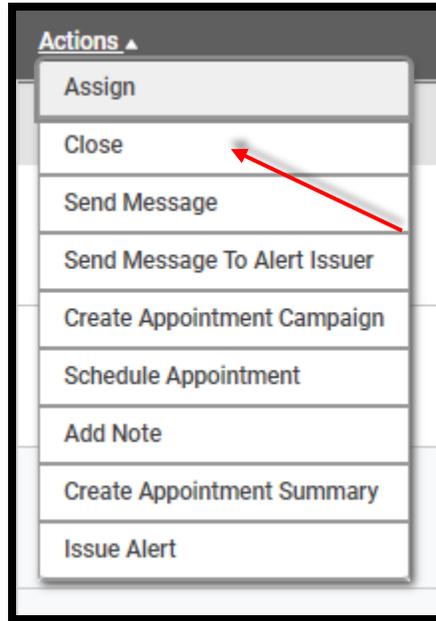
4. Choose an **Outcome** for your assigned **Case**, add a brief comment summarizing why you have closed these **Cases**, then click the **Submit** button in the bottom right corner (to allow the alert issuer to see the **Case** closure comments, click the checkbox next to **Allow closed comments to be shown in email**).