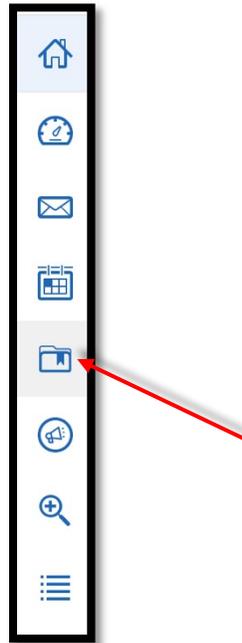


Navigate: Case Management

- Once you have logged in to Navigate, click on the **Cases** feature located on the left-hand menu bar.



- You will now see a full list of the **Cases** currently open and assigned to you.

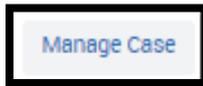
Cases


Status:

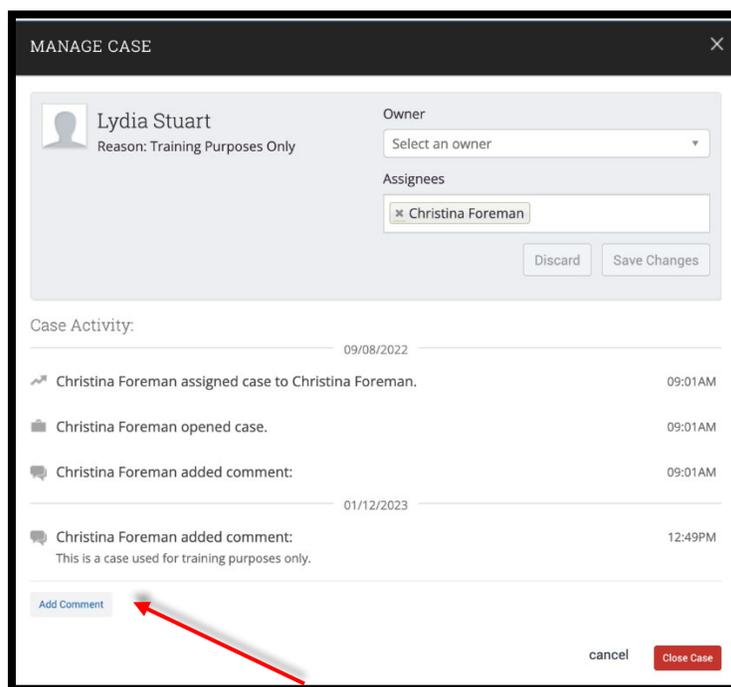
Care Unit: Student: Opened By: Assigned To: Alert Reasons: Date Opened: to Case Owner:

Actions	STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:
<input type="checkbox"/>	Lydia Stuart	Open	Mabee Library: Center for Student Success	Training Purposes Only	09/08/2022	Christina Foreman	01/12/2023	Christina Foreman	Christina Foreman	<input type="button" value="Manage Case"/>

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



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



- Next, click the **Add Comment** button to add information to your assigned **Case**. (Please Note: information should be added as it relates to attempted contacts and methods, and any conversations 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.)



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.

 A screenshot of a web application window titled "MANAGE CASE". The form contains the following fields:

- Student: Lydia Stuart
- Reason(s): Training Purposes Only
- Outcome: A dropdown menu with "Choose" selected. A red arrow points to the dropdown arrow. The menu is open, showing options: "Choose", "Alert Resolved", "Student Contacted, Alert Discussed", "Student Nonresponder", "Relevant Campus Resource(s) Notified", and "UBAT Case Created".
- Comment: A text input field.

 At the bottom left is a "Go Back" button and at the bottom right is a "Submit" button.

- 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**).

MANAGE CASE

Student: Lydia Stuart

Reason(s): Training Purposes Only

Outcome: Student Contacted, Alert Discussed

Comment:
Student has developed a plan with their instructor to get caught up in their course.]

Allow closed comments to be shown in email

[Go Back](#) [Submit](#)

- 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:

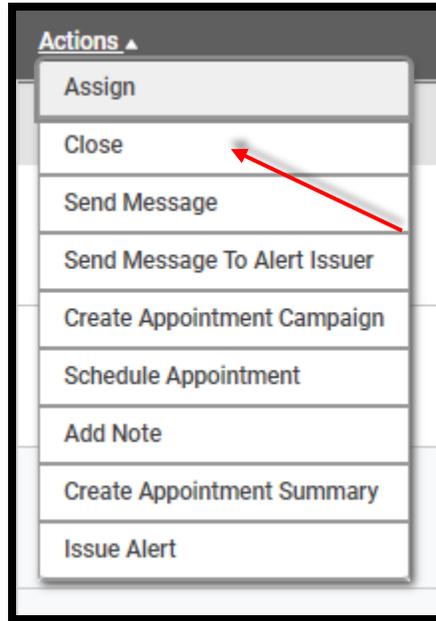
- Sort your list of assigned Cases alphabetically by student.

Actions ▾										My Students Only
<input type="checkbox"/>	STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:
<input type="checkbox"/>	Michelle Connolly	Open	Mabee Library: Center for Student Success	Training Purposes Only	05/04/2023	Christina Foreman	05/04/2023	Christina Foreman	Christina Foreman	Manage Case
<input type="checkbox"/>	Lauren Frank (she/her)	Open	Mabee Library: Center for Student Success	Training Purposes Only	05/04/2023	Christina Foreman	05/04/2023	Christina Foreman	Christina Foreman	Manage Case
<input type="checkbox"/>	Lydia Stuart	Open	Mabee Library: Center for Student Success	Training Purposes Only	05/04/2023	Christina Foreman	05/04/2023	Christina Foreman	Christina Foreman	Manage Case
<input type="checkbox"/>	Lydia Stuart	Open	Mabee Library: Center for Student Success	Training Purposes Only	09/08/2022	Christina Foreman	02/24/2023	Christina Foreman	Christina Foreman	Manage Case

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

Actions ▾	
<input type="checkbox"/>	STUDENT STATUS
<input type="checkbox"/>	Michelle Connolly Open
<input type="checkbox"/>	Lauren Frank (she/her) Open
<input checked="" type="checkbox"/>	Lydia Stuart Open
<input checked="" type="checkbox"/>	Lydia Stuart Open

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**).

A screenshot of a form titled 'CLOSE CASES'. It contains the following elements:

- 'Case(s) 2' label
- 'Outcome:' dropdown menu with 'Choose' selected
- 'Comment:' text area
- Checkbox labeled 'Allow closed comments to be shown in email' (unchecked)
- 'cancel' button
- 'Submit' button