

Alerts can be configured to automatically open a **Case**. A Case is an electronic case file where staff across departments (e.g., financial aid, bursar, tutoring, counseling) can coordinate and collaborate on the follow-up with the student. Cases create a formalized next step for action or intervention on the issued Alert, should that be needed. The decision to automatically open Cases for certain Alerts is entirely up to the institution and will differ based on configurations in your platform. Contact your Application Administrator if you have questions about which of your Alerts open Cases. Only faculty or staff with appropriate permissions have access to view or manage Cases.

## Viewing and Managing Cases

There are three ways to view and manage cases through the Navigate360 platform: the Cases page, a Student Profile, or Standard Reports.

### Cases Page

With the correct permissions, you can view and manage all open and closed cases on the Cases page. It is a streamlined view where users can access and search all cases they have permission to view in one place.

STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:
<a href="#">Qacha Badie</a>	Open		Alert Test	01/28/2022	Satyam_support 435	02/08/2022	Erin Doyle	Test 123, Test=17310	<a href="#">Manage Case</a>
<a href="#">Kyle Stanhope</a>	Open		Classroom Concern	12/08/2021	Support 435	12/08/2021	Support 435		<a href="#">Manage Case</a>
<a href="#">Kyle Stanhope</a>	Open		Alert Test	12/08/2021	Support 435	12/08/2021	Support 435	Test 123, Test=17310	<a href="#">Manage Case</a>
<a href="#">John Aavang</a>	Open	Academic Center for Excellence	Asks Great Questions!	11/12/2021	Wesley Pendarvis	11/30/2021	Support 435	Support 435	<a href="#">Manage Case</a>
<a href="#">Bronwyn Po</a>	Open		Alert Test	11/11/2021	Satyam_support 435	11/11/2021	Satyam_support 435	Test 123, Test=17310	<a href="#">Manage Case</a>
<a href="#">John Aavang</a>	Open	Academic Advising (Do Not Use)	Coursework Incomplete (Include Comments re: Prior Outreach)	11/01/2021	Pooh Poley	11/30/2021	Support 435	Test 123	<a href="#">Manage Case</a>
<a href="#">John Aavang</a>	Open	Academic Advising (Do Not Use)	Academic Integrity	11/01/2021	Pooh Poley	11/30/2021	Support 435	Test 123	<a href="#">Support</a>

The table of student cases has the following column headers.

### Student

Student name associated with the case.

**Status**

The status of the Case, which can be **open** or **closed**.

**Care Unit**

Care Unit the Case is associated with. Cases can only be associated with ONE Care Unit.

**Reason**

The Alert Reason that triggered opening the Case.

**Date Opened**

Date the Case was originally opened.

**Opened By**

Staff member who issued the Alert.

**Date Updated**

Date the Case was last updated. This could also be the date of closing the Case.

**Updated By**

Staff member who last updated the Case.

**Assigned To**


The staff members assigned to follow through on the opened Case. For example, if the alert reason is *Needs Tutoring*, a Case could be automatically assigned to the head of tutoring. A Financial Aid alert reason could be assigned to a financial aid services employee. These assignments are configured on the [Alert Reasons page](#) and depend on your institution's user roles and configurations.

**Case Owner**

The Case owner is someone who has been assigned to and is managing the Case. For example, if a Case is assigned to a group in Financial Aid, the Case owner is responsible for triaging the Case by assigning it to the specific financial aid counselor who will be working with the student. You can only manually assign the Case owner within the case.

From this page, you can also manage the Case from this section by selecting **Manage Case**.

**MANAGE CASE**
✕



**Laura Gonzales**

Reason: 3+ Absences

**Owner**

Select an owner ▼

**Assignees**

✕ Jack Whitten
✕ Annette Brock

✕ Pavani Reddy
✕ Bianca Roy

✕ Gary Broom
✕ Steven Richardson

✕ Thomas Lewis
✕ Kelsey May

Discard
Save Changes

**Case Activity:**

---

06/22/2023

- ↗

Jack Whitten assigned case to Jack Whitten.

3:57pm ET
- ↗

Jack Whitten assigned case to Annette Brock.

3:57pm ET
- ↗

Jack Whitten assigned case to Pavani Reddy.

3:57pm ET
- ↗

Jack Whitten assigned case to Bianca Roy.

3:57pm ET
- ↗

Jack Whitten assigned case to Gary Broom.

3:57pm ET
- ↗

Jack Whitten assigned case to Steven Richardson.

3:57pm ET
- ↗

Jack Whitten assigned case to Thomas Lewis.

3:57pm ET
- ↗

Jack Whitten assigned case to Kelsey May.

3:57pm ET

Add Comment

cancel
Close Case

The following list is information and actions in the **Manage Case** dialog.

**Student Name**

Name of the student for whom the Case is opened.

**Class**

The course associated with the issued Alert.

### **Reasons**

The Alert reasons.

### **Case Owner**

The Case owner is someone who has been assigned to and is managing the Case. For example, if a Case is assigned to a group in Financial Aid, the Case owner would be responsible for triaging the Case by assigning it to the specific financial aid counselor who will be working with the student.

### **Assignees**

The staff members assigned to follow through on the opened Case. For example, if the alert reason is **Needs Tutoring** a Case could be automatically assigned to the head of tutoring. A Financial Aid alert reason could be assigned to a financial aid services employee. These assignments are configured in alert reasons and depend on your institution's user roles and configurations.

### **Case Activity**

All recorded changes to the Case owner or assignees, as well as messages sent to assignees, appointments made due to the case, documented comments and Case closed reasons (if closed).

### **Add Comment**

Select this option to add a comment to the Case record

### **Close Case**

Select this option if the Case should be closed. You are directed to the next page, prompting you to choose a required Case outcome and add comments to provide context to closing the Case. Please note that if a case was opened from an alert that was issued by a student using Hand Raise, that student would receive the closure comments since they were the original alert issuer.

### MANAGE CASE ✕

Student: Laura Gonzales

Reason(s): 3+ Absences

Outcome: 3x Outreach - No Response from Student ▾

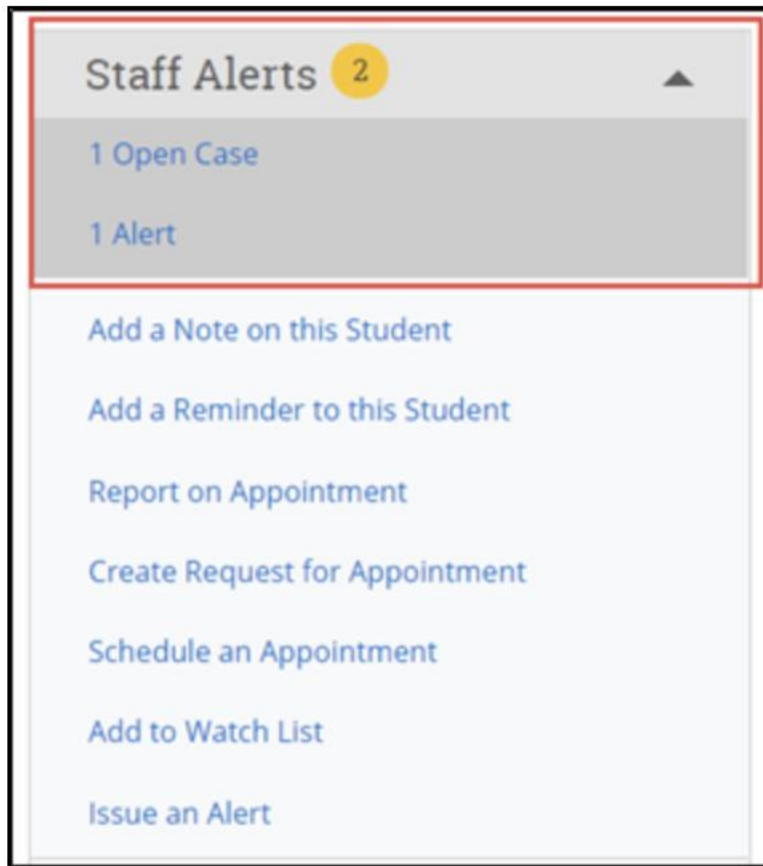
Comment:

Allow closed comments to be shown in email

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

### Student Profile

To view and manage Cases on the student profile, navigate to the student profile. On the right side of the profile, the total number of staff Alerts for that student is listed at the top right. This count includes all Alerts, Cases, and Progress Reports issued for the student. Based on your institution's configurations, this count may include *all issued Alerts* in the platform, or it may only include *Alerts issued in the current term*. Contact your Application Administrator if you have questions about your institution's configuration for this count.



To view additional information about the open Cases, either select the *X Open Cases* link or open the **History** or **Reports/Notes** tab of the Student Profile.

You can view all open and closed Cases that you have permissions to see for the student either in the Cases section of the **Reports/Notes** tab or on the **History** feed.

In the Cases section:

Cases For Zuwena ▾

Open Cases Closed Cases

Open Cases For Zuwena

DATE OPENED	REASONS	ISSUED BY	ASSIGNED TO	
11/12/2018	Attendance Concerns	LaToya White	Emily White, Ben Galina, Shelagh Mollohan	<a href="#">Manage Case</a>
11/12/2018	Attendance Concerns	LaToya White	Emily White, Ben Galina, Shelagh Mollohan	<a href="#">Manage Case</a>
04/25/2018	Needs Tutoring	LaToya White	Sara Kuzmik, Shelagh Mollohan	<a href="#">Manage Case</a>
03/16/2018	Low test scores	LaToya White	Katherine Matthews	<a href="#">Manage Case</a>

Information provided in the Cases section includes:

**Date Opened**

Date the Case was originally opened.

**Date Updated**

Date the Case was last updated. This could also be the date of closing the Case.

**Reasons**

The Alert reason that triggered opening the Case.

**Issued By**

Staff member who issued the Alert.

**Assigned To**

The staff members assigned to follow through on the opened Case. For example, if the alert reason is *Needs Tutoring*, a Case could be automatically assigned to the head of tutoring. A Financial Aid alert reason could be assigned to a financial aid services employee. These assignments are configured on the [Alert Reasons page](#) and depend on your institution's user roles and configurations.

You can also manage the Case from this section by selecting **Manage Case**. Information and actions in the **Manage Cases** dialog on the Student Profile are the same as on the **Cases** page.

The following actions can be taken from the **Actions** menu on the Cases report:

- Send a Message
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Alert
- Delete Case: this action allows the user to delete the selected Cases.
- Add to Student List
- Add To-Do
- Add Journey (for institutions with this feature active)