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.

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**.

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 A*lerts issued in the current term*. Contact your Application Administrator if you have questions about your institution's configuration for this count.
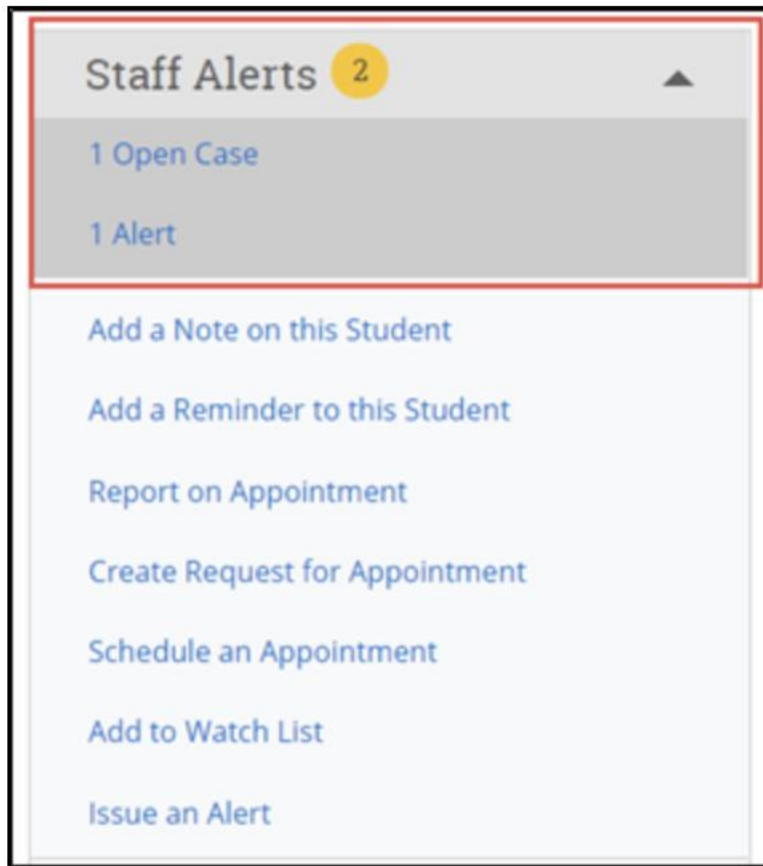
To view additional information about the open Cases, either select the *X Open Cases* link or open the **History** or **Reports/Notes** tab of the Student Profile.

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:

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)