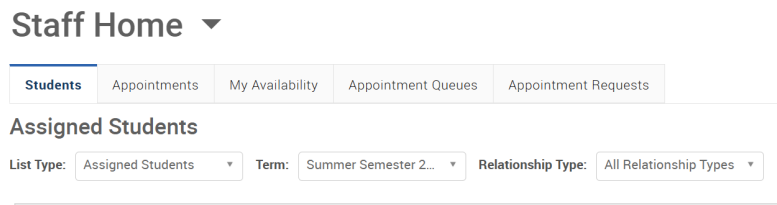


## Navigate: Cases

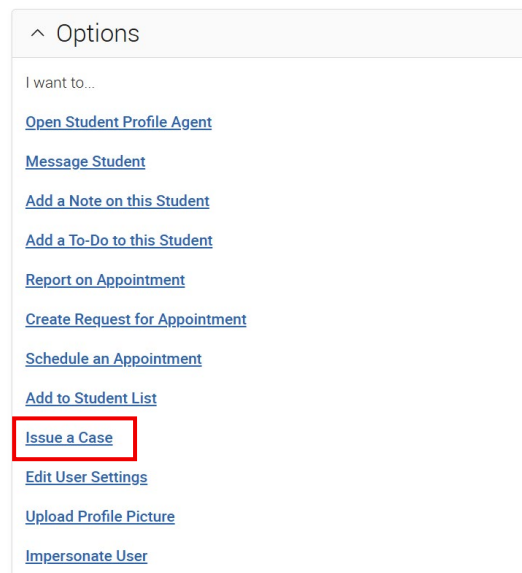
**Objective:** Cases are used to trigger additional follow-up with students for various reasons. You may create cases for students, or you may also be assigned to a case. This guide will assist you in learning how to open a case as well as how to check on and update cases as needed.

### Creating a Case

1. There are two ways to issue a case: a.) from the Staff Homepage; or b.) from the student's profile
  - a) From your Staff Homepage, select "Issue a Case" from the righthand side under Actions. If the student is assigned to you, you can also see them under your Students Tab, select their name, and choose "Actions" to Issue a Case.



- b) Search for the student using the search bar at the top of the page. On their profile, select "Issue Case" under the Options box on the righthand side.



2. Once the student is selected, choose the appropriate reason for the case. If the case is associated with a particular class, you can select that from the drop down menu.
3. Add detailed comments to describe why the case is being issued.

**ISSUE CASE** ✕

Student Kathrynne (Kate) Verheyen

Please select a reason ✕ Academic Performance

Is this associated with a specific class? HIST-1111-10 Surv World History/Civiliz I

Additional Comments

Kate has not submitted Essay 1, Essay 2, or Essay 3. She also missed the first exam. I have reached out to her but received no response. I am willing to accept the essays for half credit if she contacts me by the end of the week.

Below you will find the details for each Case Reason chosen and what action(s) will be taken.

Academic Performance:

- A case will be opened and assigned to a staff


Cancel
Submit

4. Once the case is submitted, it will route to the appropriate individuals.

## Viewing/Managing a Case

1. If you have been assigned a case, you may view it by navigating to the Cases page on the navigation bar. You will be able to see any cases that have been assigned to you in one place.

### Cases



Showing a maximum of 50,000 cases. Refine your search to narrow results.

Switch to Advanced Filters ⊕

Status ⊕

All Active Cases ▼

Care Unit ▼ Student ▼ Opened By ▼ Assigned To ▼ Alert Reasons ▼ Alert Type ▼ Date Opened to

Case Owner ▼

My Students Only

Apply Filters
Reset Filters

Search in Results ⊕

<input type="checkbox"/>	CASE ID	STUDENT NAME	CARE UNIT	ALERT REASONS	OPENED BY	OPENED AT DATE	UPDATED BY
<input type="checkbox"/>	11201 <span style="font-size: xx-small;">↗</span>	Ogde, Shrek <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica
<input type="checkbox"/>	11202 <span style="font-size: xx-small;">↗</span>	Servais, Riley <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica
<input type="checkbox"/>	11203 <span style="font-size: xx-small;">↗</span>	Potter, Harry <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica
<input type="checkbox"/>	11204 <span style="font-size: xx-small;">↗</span>	Weasley, Ginny <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica
<input type="checkbox"/>	11205 <span style="font-size: xx-small;">↗</span>	Vandawalker, Stanley <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica
<input type="checkbox"/>	11206 <span style="font-size: xx-small;">↗</span>	Zaxas, Thais <span style="font-size: xx-small;">↗</span>		Major Change	Owens, Jessica	05/11/2026	Owens, Jessica

1 - 100 of 4556
100
K < 1 2 3 4 5 > |

2. To view the details of a case, click on the Case ID.
3. You can see the history of actions on the case under Case Activity, including when the case was opened, the initial case comments, and who the case has been assigned to.

4. Several actions can be taken from within a case:
  - a. You can Follow the case to keep up with any updates while the case is open.
  - b. You can send a message to the student or to the Case Issuer, and it will be noted in the case activity that a message was sent.
  - c. You can close the case by hitting “Edit Details” and changing the Status from Open to Closed.

Cases can be viewed from the student’s profile. Once you navigate to the student profile, the student’s cases and progress reports can be accessed on the righthand side. Clicking on either link will take you directly to that section on the Reports/Notes tab of the student profile, where you can toggle between open and closed cases.

