# Navigate: Cases

## What are Cases?

A Case is an **Alert** or **Referral** that is assigned to the student's advisor(s), or in some instances, a campus official for further action. Moreover, 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 or Referral, should that be needed. The electronic record logs all attempted outreach (failed/successful), and **Case Outcomes**. Details about the Case, including the **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page. More information on this is below.

When a case is generated, it triggers a protocol that notifies the student and the student's academic advisor(s) via an **email notification**.

## Viewing and Managing Cases You Have Been Assigned To

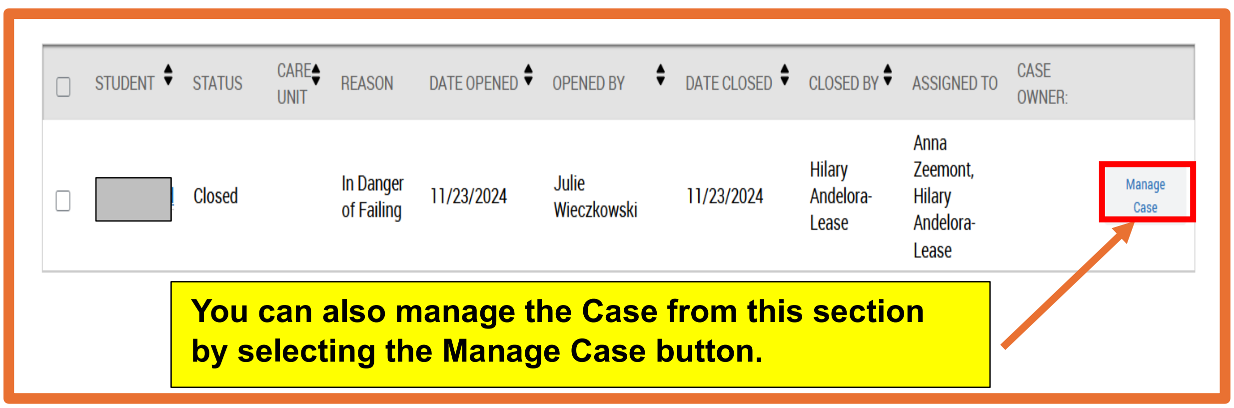
There are two ways to view and manage Cases through the Navigate platform:

1. The **Cases** page
2. Student Profile

**Important Note:** You **cannot** view your assigned or owned cases from your **Staff Home** page.

## Cases Page

With the correct permissions, you can view and manage all **Open** and **Closed** Cases that you have been assigned to 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. On the left-hand side of your Navigate toolbar, locate the **Cases** icon.


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.

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

**Student Name** - Name of the student for whom the Case is opened.

**Class** - The course associated with the issued Alert.

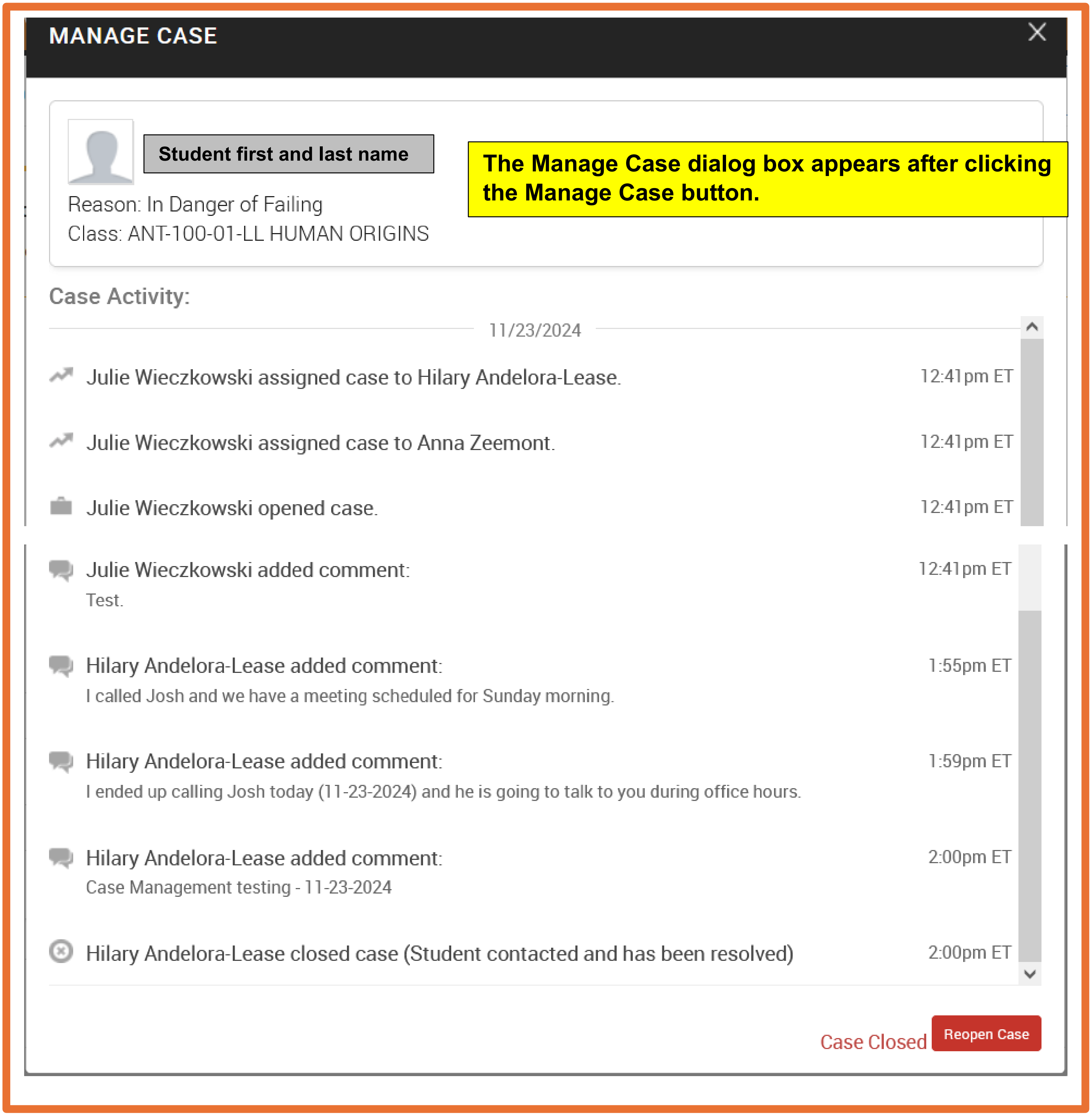
**Reasons** - The Alert Reasons.

**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. Adding comments are very important.




This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 12/23/2024]**

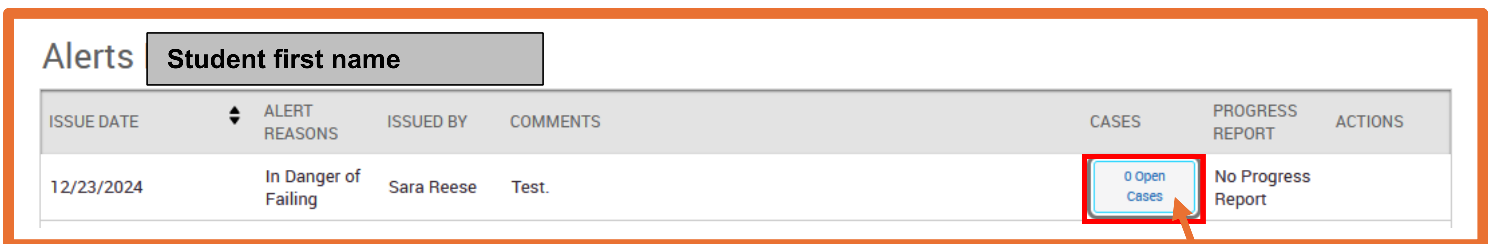
> **Important Note:** Any information you enter into the Navigate platform pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

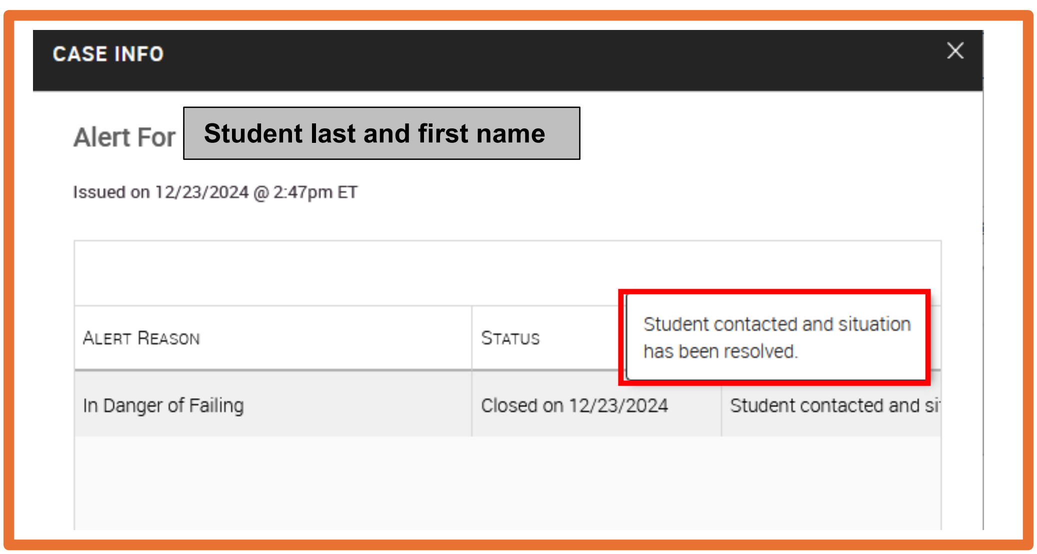
## Close Case

Select this option if the Case should be closed. You are directed to the next page, prompting you to choose a required **Case Outcome** (Case Closure Reason) 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.

Details about the Case, including the **Case Outcome** (Case Closure Reason), can be found on the **History** tab of a **Student's Profile** page.

If the Case is closed, you may view the **Case Closure Reason** by clicking on the blue link under the Cases column.

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