
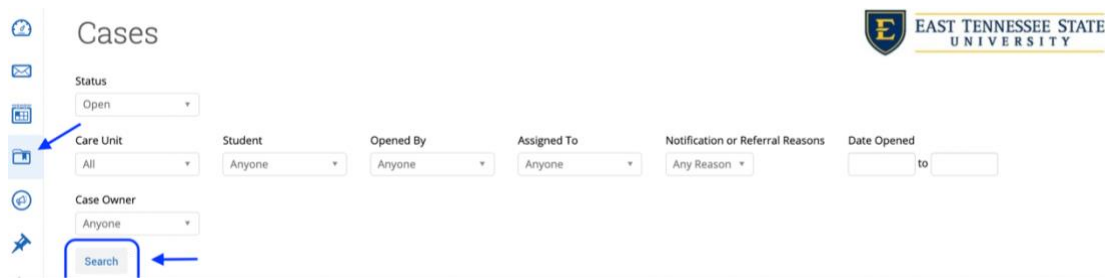


Navigate - Manage Cases

Alerts can be configured to automatically open a Case, which is essentially an electronic case file where staff can coordinate for a single student across departments

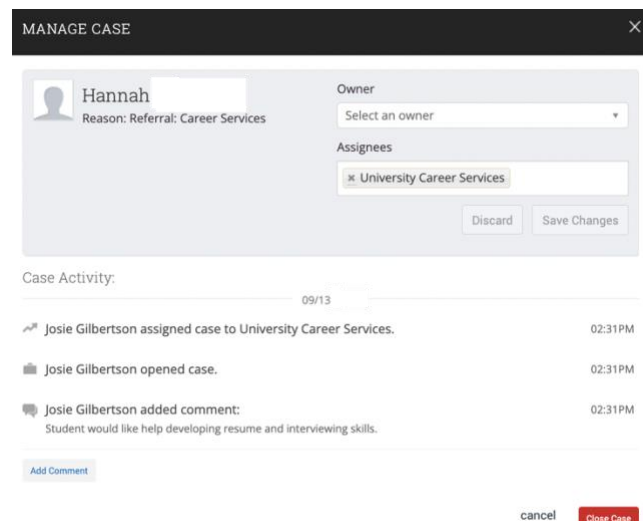
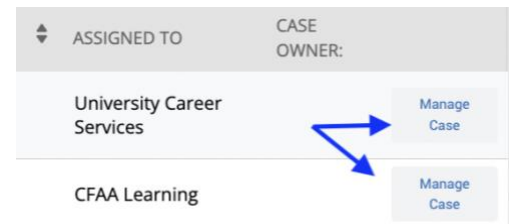
1. Open and view cases for the Care Unit

- Click the [Cases](#) icon  on the left side of the screen
- Use the filters at the top of the [Cases](#) screen to search for:
 - Open and closed [Status](#)
 - Cases by [Care Unit](#)
 - Cases for a specific [Student](#)
 - Cases [Opened By](#) a specific staff user
 - Cases [Assigned To](#) a specific staff user
 - Cases opened for a specific [Alert Reason](#)
 - A range of [Dates Opened](#)
 - A specific [Case Owner](#)
- After inputting filters, click [Search](#)



2. Manage a specific Case

- Click the [Manage Case](#) button to the right of the case information.
- In the [Manage Case](#) window, take one of three actions:
 - Change the owner of the case by clicking in the [Owner](#) drop-down box and selecting a staff user. This will assign the case to a specific user in the Care Unit
 - Add notes or comments to the case by clicking the [Add Comment](#) button the left corner of the [Manage Case](#) window
 - Close the case by clicking the red Close Case button in the bottom right corner of the [Manage Case](#) window
 - A new [Manage Case](#) window will appear.
 - Click [Outcome](#) drop-down menu and select the reason for closing the case
 - Type notes into the [Comment](#) text box
 - Upon closing a case, an email will be sent to the staff member who opened the case. If desired, click the checkbox for [Allow closed comments to be shown in email](#)
 - Click [Close Case](#) to close the case



3. Close multiple cases at once

- On the *Cases* screen, input filters and then click the checkboxes next to the student names for the cases to be closed
- Click the *Actions* menu in the grey bar above the checkboxes.
- Click *Close* from the *Actions* menu
- In the Close Cases window that appears, select the Outcome reason and add comments
- Click *Submit* to close the cases

Cases

Status
Open

Care Unit: All Student: Anyone Opened By: Anyone Assigned To: Anyone Notification or Referral Reasons: Any Reason

Case Owner: Anyone

Search

	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY
<input type="checkbox"/>	Referral: Career Services				
<input type="checkbox"/>	Refer to CFAA for Tutoring				
<input type="checkbox"/>	Refer to CFAA for Tutoring				
<input type="checkbox"/>	Refer to CFAA for Tutoring				
<input checked="" type="checkbox"/>	Refer to CFAA for Tutoring				
<input checked="" type="checkbox"/>	Refer to CFAA for Tutoring				

Actions

- Assign
- Close
- Send Message
- Send Message To Notification or Referral Issuer
- Create Appointment Campaign
- Schedule Appointment
- Add Note
- Create Appointment Summary
- Issue Notification or Referral