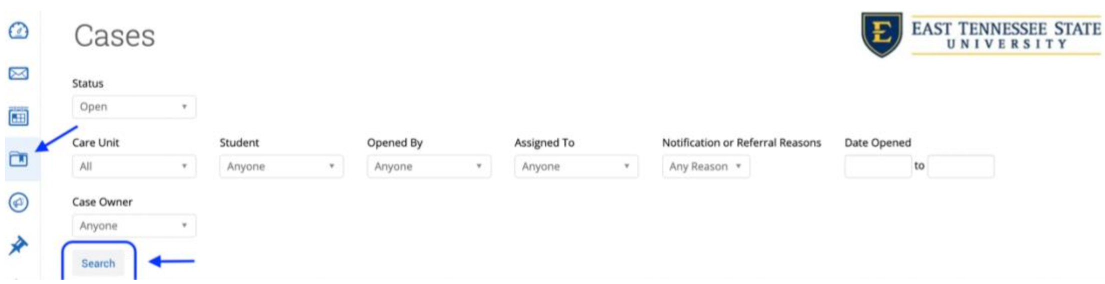
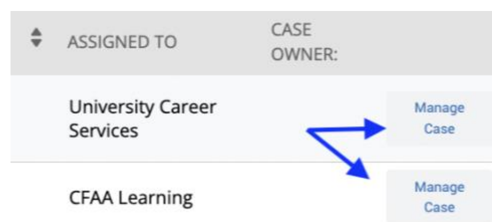
Navigate - Manage Cases

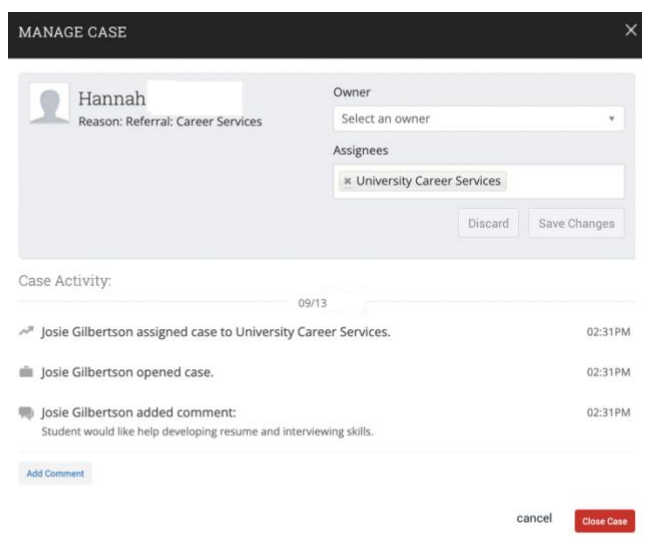
Alerts can be configured to automatically open a Case, which is essentially an electronic case file where staff can coordinate for a single student across departments

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