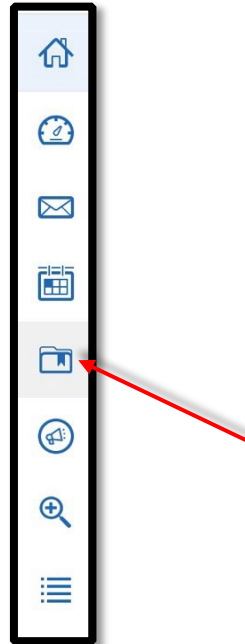


## Navigate: Case Management

- Once you have logged in to Navigate, click on the **Cases** feature located on the left-hand menu bar.



- You will now see a full list of the **Cases** currently open and assigned to you.

Cases

Status:

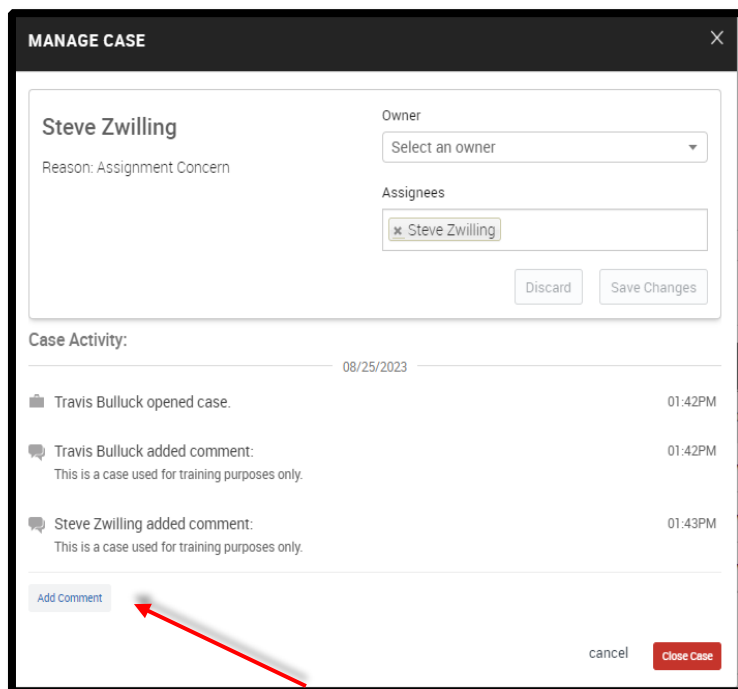
Care Unit:  Student:  Opened By:  Assigned To:  Alert Reasons:  Date Opened:  to  Case Owner:

Actions <span style="float: right;">My Students Only</span>										
<input type="checkbox"/>	STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:
<input type="checkbox"/>	<a href="#">Kamari Jones</a>	Open		Not paying attention or is sleeping	08/25/2023	Morgan Winstead	08/25/2023	Steve Zwilling	Haley Mitchell	<input type="button" value="Manage Case"/>
<input type="checkbox"/>	<a href="#">Kelsi Martin</a>	Open		Attendance Concern	08/24/2023	Rachel Adams	08/24/2023	Steve Zwilling	Steve Zwilling	<input type="button" value="Manage Case"/>

- To add comments to a **Case**, select the **Manage Case** button found on the right-hand side, next to each individual case.



- A **Manage Case** form will now appear on your screen with any information or comments added by the **Case** issuer.



**MANAGE CASE**

**Steve Zwilling**  
Reason: Assignment Concern

Owner: Select an owner

Assignees: Steve Zwilling

Discard Save Changes

Case Activity: 08/25/2023

- Travis Bulluck opened case. 01:42PM
- Travis Bulluck added comment: This is a case used for training purposes only. 01:42PM
- Steve Zwilling added comment: This is a case used for training purposes only. 01:43PM

Add Comment

cancel Close Case

- Next, click the **Add Comment** button to add information to your assigned **Case**. (Please Note: information should be added as it relates to attempted contacts and methods, and any conversations had with the student regarding the issue comments. These conversations may be in-person, phone, video conference, or email. **Cases** may be updated multiple times.)

This is how to add a comment.

Add Comment

6. To close a **Case**, please select the **Close Case** button found on the bottom right corner of the **Manage Case** form.



7. Choose an **Outcome** for your assigned **Case**, this is the reason you are closing the **Case**.

Case Outcomes include:

- **Counseled** – the issue is resolved with the student.
- **Outreach Completed, No Student Response** – tried to contact the student three times, through three methods (if available), over the course of two weeks.
- **Referred to Tutoring** – referred student to another campus office/resource for additional support.
- **Referred to SCRT** – referred student to the Student Concern Response Team (Kellie Monteith, Student Affairs).
- **Course or University Withdrawal** – Student withdrew from course or semester.
- **Referred to Academic Integrity** – Referred student to Dean of Students
- **Referred to Conduct** – Referred student to Student Community Ethics

MANAGE CASE

Student: Steve Zwilling

Reason(s): Assignment Concern

Outcome: Choose

Comment:

Choose

Expired

Counseled

Referred to SCRT

Referred to Tutoring

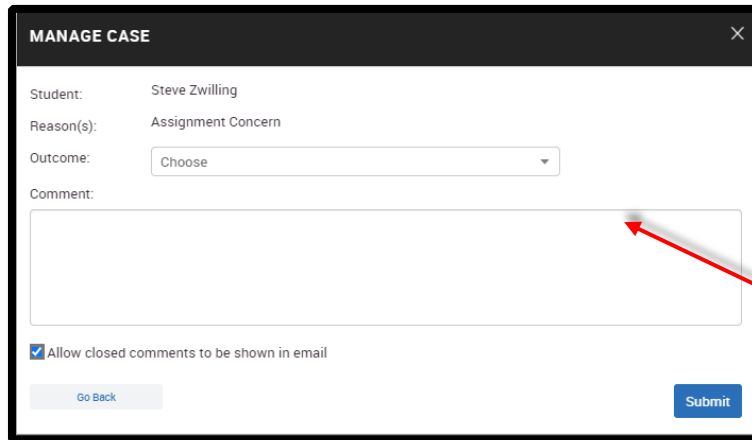
Course Withdrawal

University Withdrawal

Allow closed con

Go Back Submit

- Then, add a brief comment summarizing why you have closed this **Case** (to allow the alert issuer to see the **Case** closure comments, click the checkbox next to **Allow closed comments to be shown in email**).



**MANAGE CASE**

Student: Steve Zwilling

Reason(s): Assignment Concern

Outcome: Choose

Comment:

Allow closed comments to be shown in email

[Go Back](#) [Submit](#)

- Finally, click the **Submit** button in the bottom right corner.



**To close multiple open cases for the same student:**

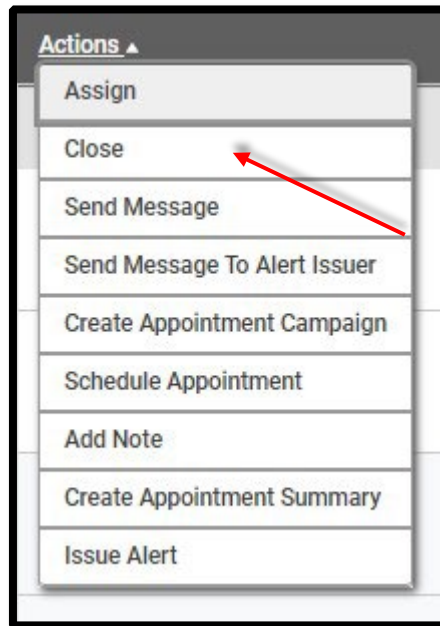
- Sort your list of assigned **Cases** alphabetically by student by clicking on “Student”.

<input type="checkbox"/>	STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:	
<input type="checkbox"/>	<a href="#">Steve Zwilling</a>	Open		Attendance Concern	08/25/2023	Travis Bulluck	08/25/2023	Travis Bulluck			<a href="#">Manage Case</a>
<input type="checkbox"/>	<a href="#">Steve Zwilling</a>	Open		Assignment Concern	08/25/2023	Travis Bulluck	08/25/2023	Steve Zwilling	Steve Zwilling		<a href="#">Manage Case</a>
<input type="checkbox"/>	<a href="#">Kamari Jones</a>	Open		Not paying attention or is sleeping	08/25/2023	Morgan Winstead	08/25/2023	Steve Zwilling	Haley Mitchell		<a href="#">Manage Case</a>
<input type="checkbox"/>	<a href="#">Kelsi Martin</a>	Open		Attendance Concern	08/24/2023	Rachel Adams	08/24/2023	Steve Zwilling	Steve Zwilling		<a href="#">Manage Case</a>

- To close the open **Cases** for a particular student, select all of the checkboxes next to their name.

<input checked="" type="checkbox"/>	STUDENT	STATUS
<input type="checkbox"/>	<a href="#">Kamari Jones</a>	Open
<input type="checkbox"/>	<a href="#">Kelsi Martin</a>	Open
<input checked="" type="checkbox"/>	<a href="#">Steve Zwilling</a>	Open
<input checked="" type="checkbox"/>	<a href="#">Steve Zwilling</a>	Open

3. Click on the **Actions** button, then select **Close**.



4. Choose an **Outcome** for your assigned **Case**, add a brief comment summarizing why you have closed these **Cases**, then click the **Submit** button in the bottom right corner (to allow the alert issuer to see the **Case** closure comments, click the checkbox next to **Allow closed comments to be shown in email**).

**CLOSE CASES** ✕

Case(s) 2

Outcome:

Comment:

Allow closed comments to be shown in email

[cancel](#)