Navigate: Case Management

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

2. You will now see a full list of the Cases currently open and assigned to you.
3. To add comments to a **Case**, select the **Manage Case** button found on the right-hand side, next to each individual case.

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

5. 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.)
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
8. 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).

9. Finally, click the Submit button in the bottom right corner.
To close multiple open cases for the same student:

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

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