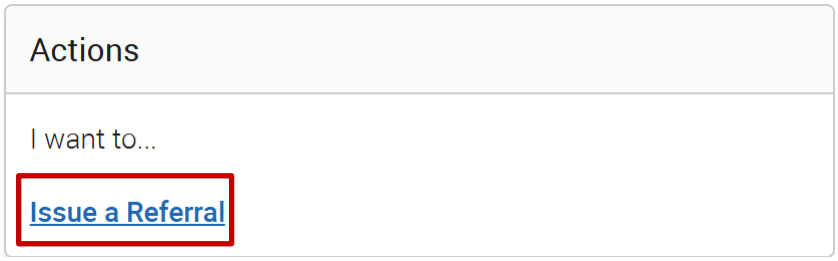
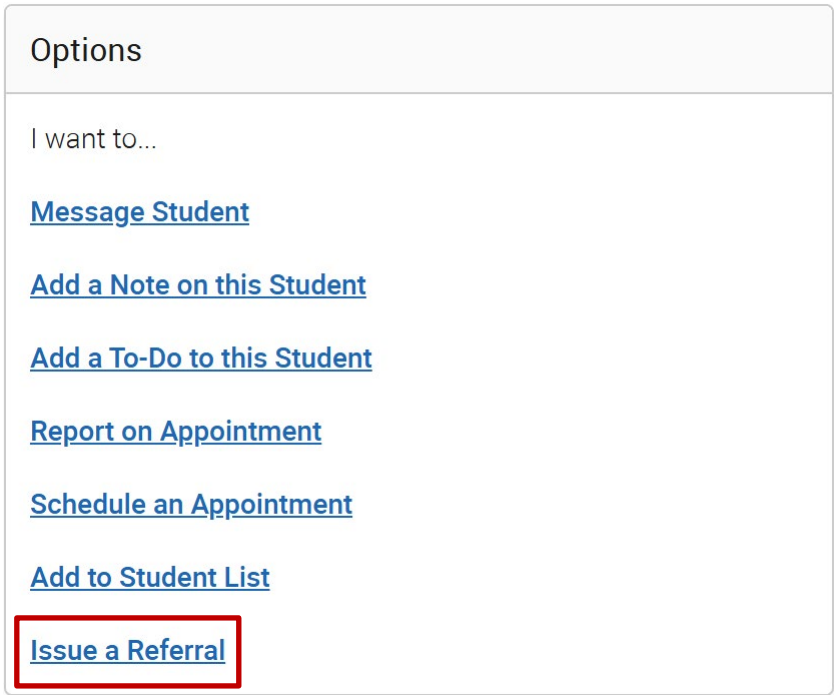
Date 4/2/2025

Creating a Case

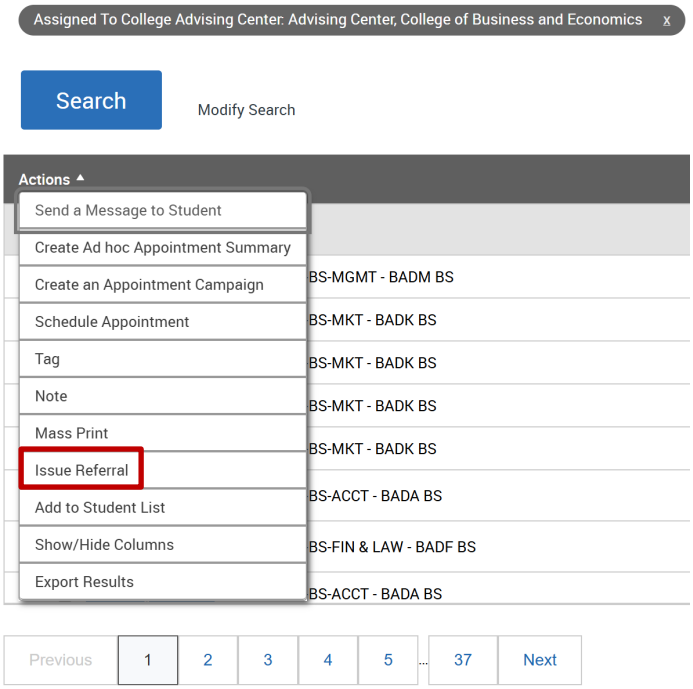
Step 1a. Issuing a Single Student Referral (Location and Methods)

Ad Hoc | Faculty/Staff Home 1. Issued through the "Actions" panel on the "Faulty/Staff Home Page	
Ad Hoc | Student Overview Page 1. Issued through the "Options" panel on a student's overview page	

Step 1b. Issuing a Multiple Student Referrals (Location and Methods)

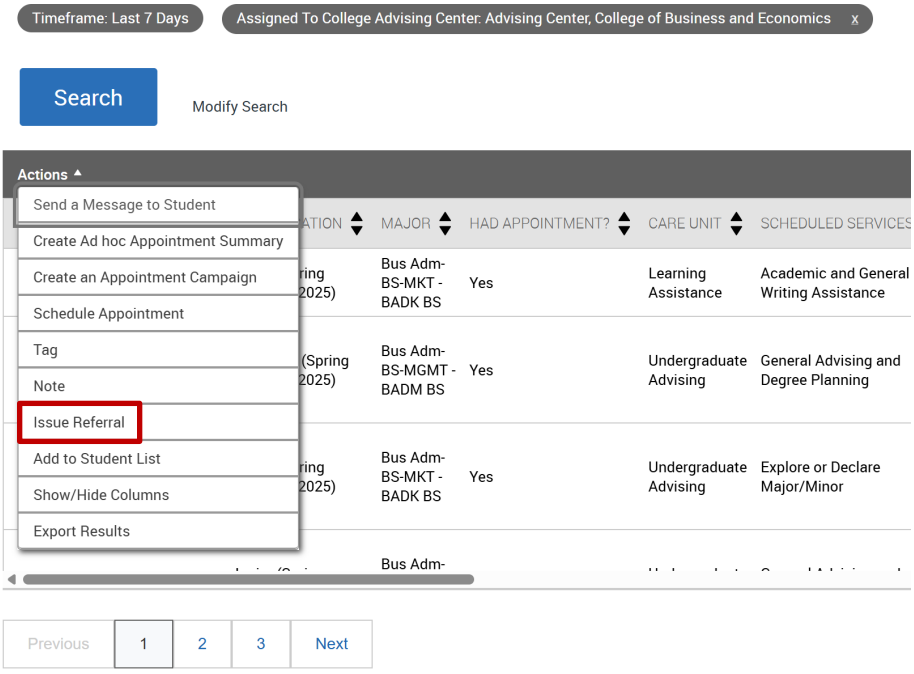
Ad Hoc | Advanced Search Result

1. Perform an “Advanced Search”
2. Select one or more students
3. Click the “Action” button to open the drop-down menu
4. Click “Issue Referral”



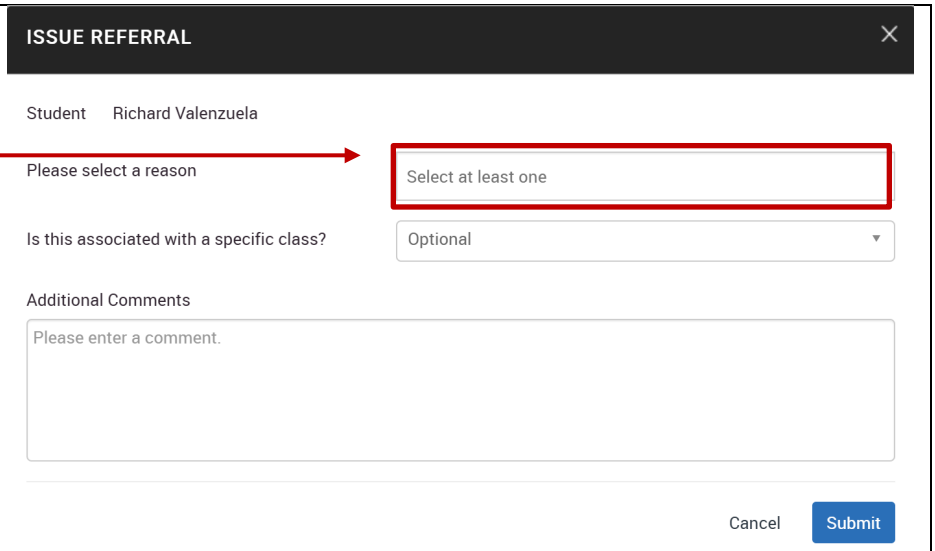
Ad Hoc | Appointments Report

1. Open the “Appointments” report
2. Configure the report as needed
3. Click “Search”
4. Select one or more students
5. Click the “Action” button to open the drop-down menu
6. Click “Issue Referral”



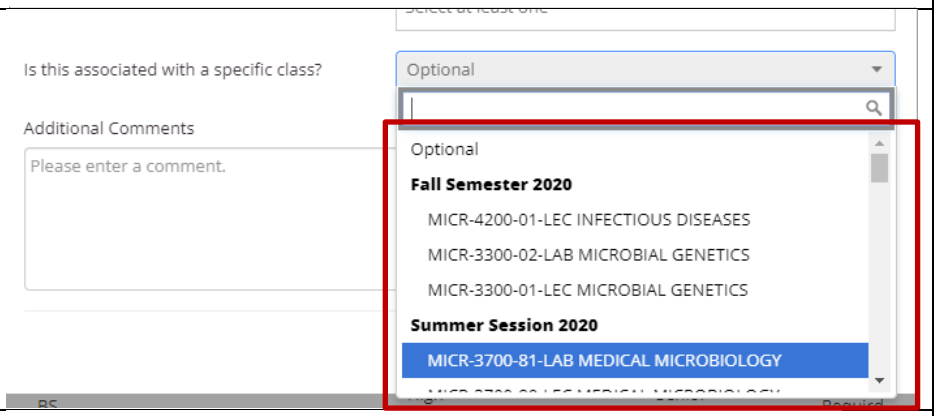
Step 2a. Defining a Referral

1. After Clicking "Issue Referral" from the previous step, the "Issue Referral" card will pop-up.
2. Select a Referral Reason
   a. Referral Reason lists may not be the same as the seen-on Progress Report Reasons
   b. Referral Reason lists can vary from Care Unit to Care Unit depending on the User Permissions



Optional Step

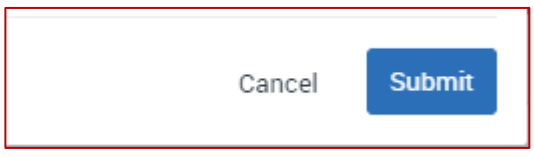
I. When issuing a referral for 1 student, the issuer has the added option of associating the Referral to a course and section
II. This step will not appear when using methods to create Referrals for multiple students
III. The list presented shows the selected student's courses both current and past



3. While it is not required, it may be helpful to add a comment to add more context to the referral for the support staff assigned to this case



4. Click "Submit" when ready to issue the Referral
   a. Note that not all Referrals will generate a case
   b. Some Referrals could send an email notification to specific users without opening a case
   c. For the purpose of this document, it is assumed the intent was to issue a Referral that will open a case

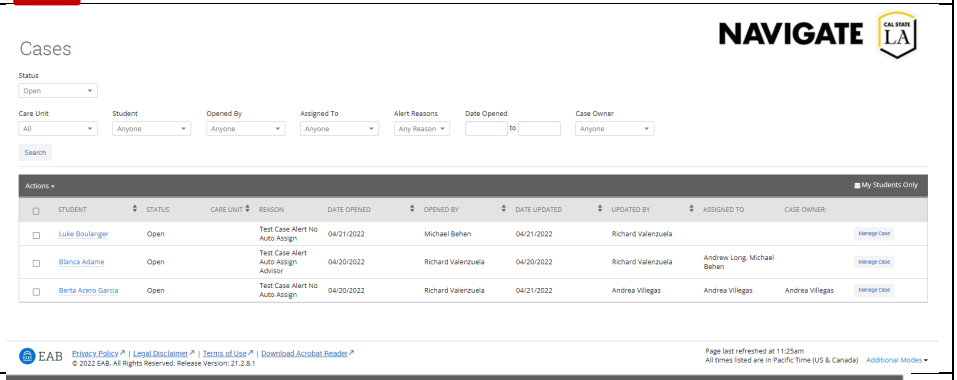


Step 3. Case Management

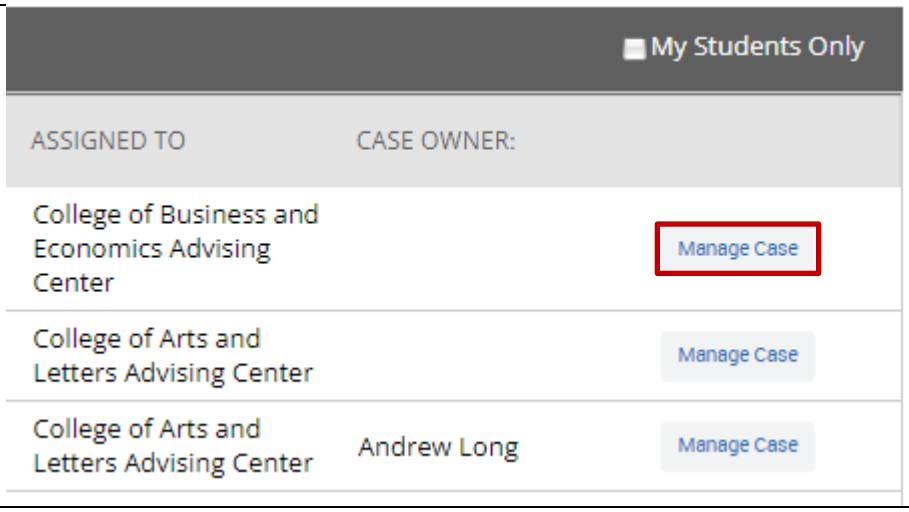
1. On the Staff Home Page, click on the File Folder Icon on the left Navigation bar
2. This will open the "Cases Page"



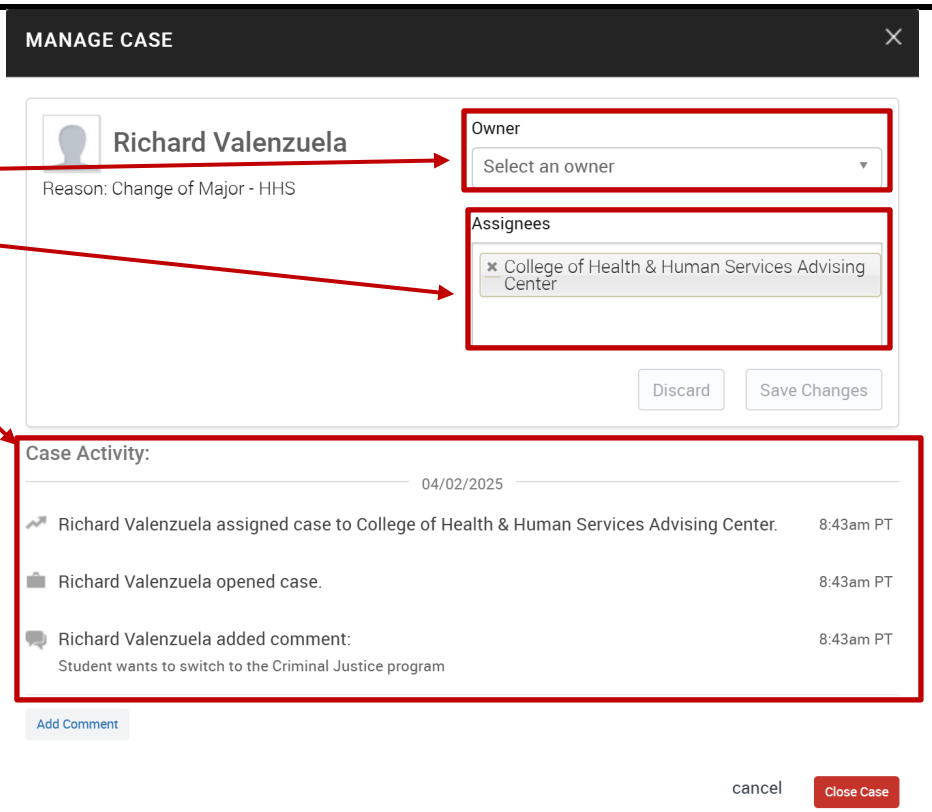
3. The list will be filtered based on **User Role** Permissions
4. Care Unit specific Cases and Cases not assigned to the user may not be visible



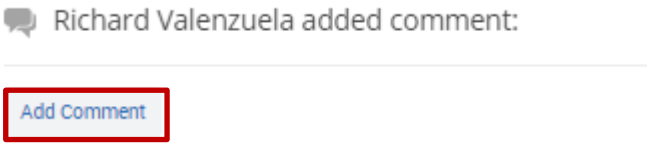
5. Click on the "Manage Case" in the far-right column of the case you want to update
6. This will open the "Manage Case" card



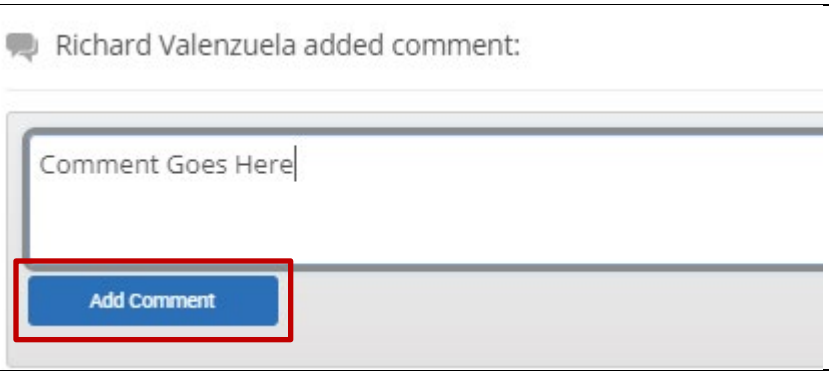
7. Those with the User Role Permission to "Assign Cases to Other Users" will be able to modify the:
    a. Owner – Staff member in charge of resolving the Case
    b. Assignees – Staff member(s) assisting with the resolution of the Case
8. Case Activity shows the chain of custody as well as the comments entered by staff supporting the case



9. Comments can be entered with the grey "Add Comments" button
10. A message box will open to write a comment

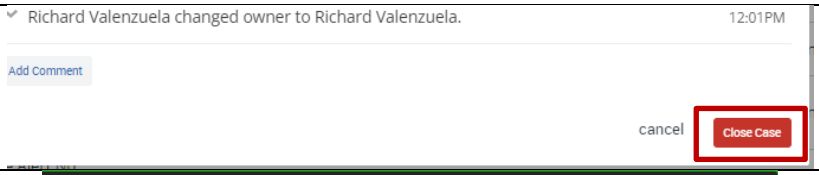


11. Once comments are entered, click the blue highlighted "Add Comment" button
12. Entries cannot be edited after submission
13. To close the case, proceed to the next step

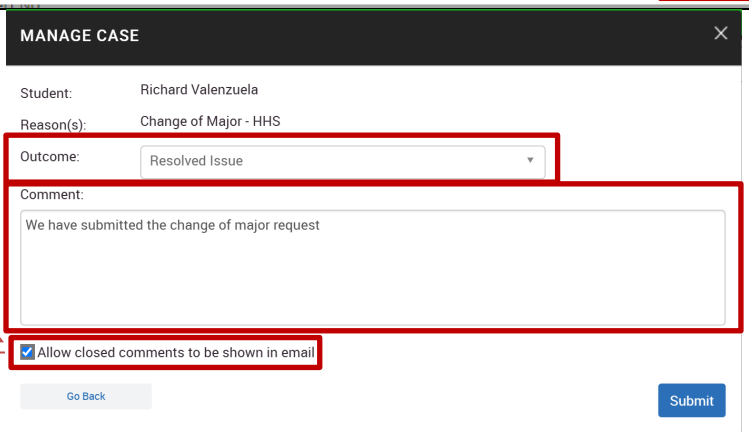


Step 4. Closing a Case

1. To close a case, open the "Manage Case" card and click on the "Close Case" button on the bottom right most section of the card



2. Select an outcome
3. While it is not required, you may enter a "Comment" to catalog the actions and or reason the case is being close.
4. You may opt to add the closing comments to the outgoing email sent to the case issuer
    a. Only the comments listed on the case closure will be sent via email.



Sample Email with Case Comment

