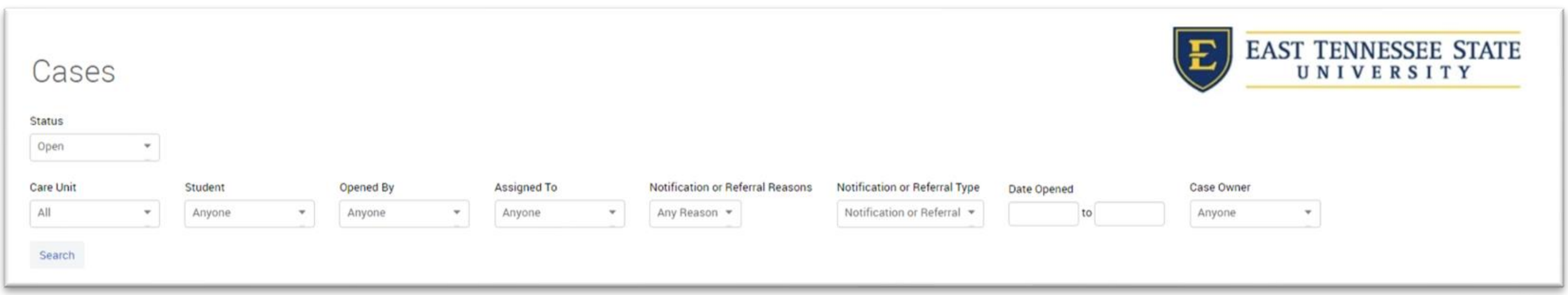
Navigate360: Manage Cases

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. Cases are managed at the Care Unit level.

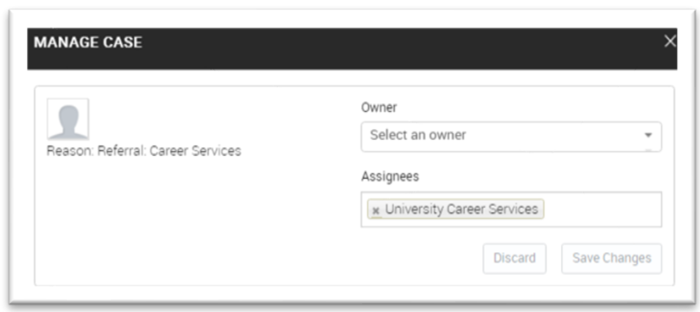
1. Open and view cases for the Care Unit

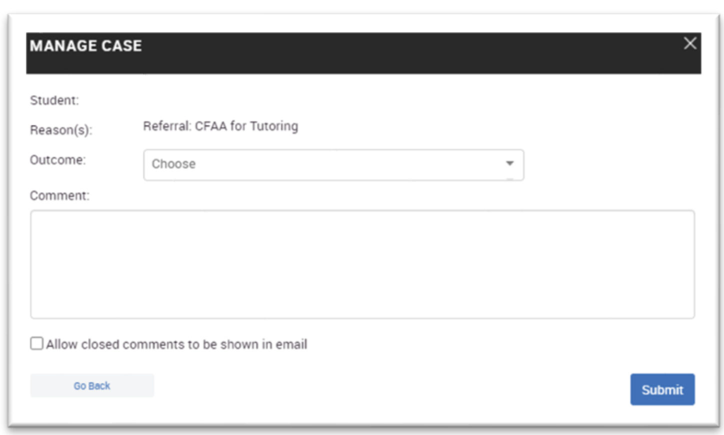
- Click the *Cases* icon on the left side of the screen
- Use the filters at the top of the *Cases* screen to search for:
  - Open and closed *Status*
  - Cases by *Care Unit*
  - Cases for a specific *Student*
  - Cases *Opened By* a specific staff user
  - Cases *Assigned To* a specific staff user
  - Cases opened for a specific *Notification or Referral 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 Close Case 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





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- 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 *Submit* to close the cases

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