
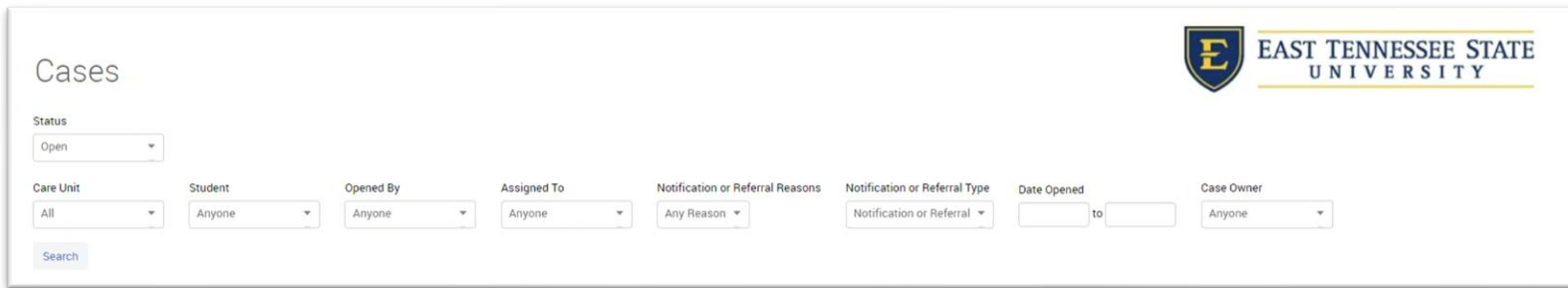


## Navigate360: Manage Cases

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

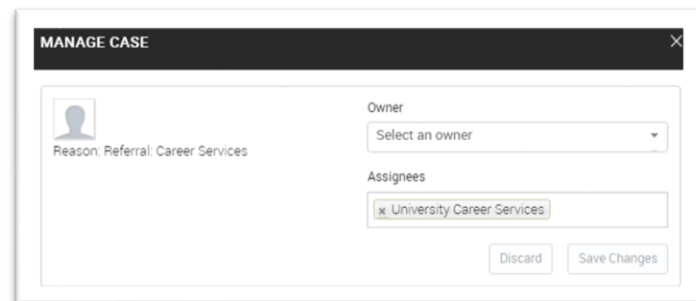
- Click the [Cases](#) icon  on the left side of the screen
- Use the filters at the top of the [Cases](#) screen to search for:
  - Open and closed [Status](#)
  - Cases by [Care Unit](#)
  - Cases for a specific [Student](#)
  - Cases [Opened By](#) a specific staff user
  - Cases [Assigned To](#) 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](#)



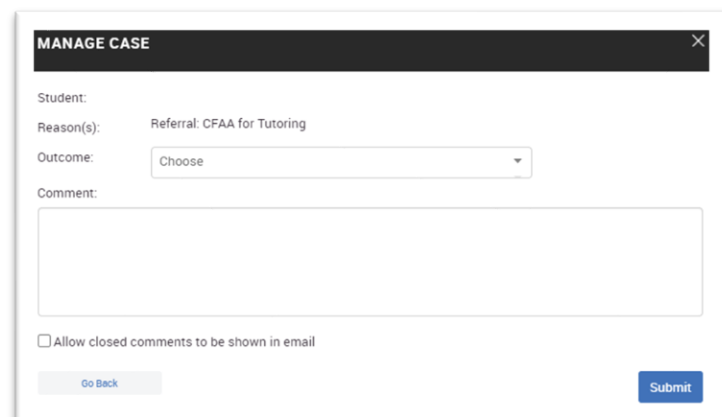
The screenshot shows the 'Cases' management interface. At the top left, the word 'Cases' is displayed. On the right, the East Tennessee State University logo is visible. Below the header, there are several filter dropdown menus: Status (set to 'Open'), Care Unit (set to 'All'), Student (set to 'Anyone'), Opened By (set to 'Anyone'), Assigned To (set to 'Anyone'), Notification or Referral Reasons (set to 'Any Reason'), Notification or Referral Type (set to 'Notification or Referral'), Date Opened (with 'to' input fields), and Case Owner (set to 'Anyone'). A 'Search' button is located at the bottom left of the filter area.

### 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



The screenshot shows the 'MANAGE CASE' window. It features a profile icon and the text 'Reason: Referral: Career Services'. There are two main sections: 'Owner' with a dropdown menu labeled 'Select an owner', and 'Assignees' with a dropdown menu showing 'University Career Services'. At the bottom right, there are 'Discard' and 'Save Changes' buttons.



The screenshot shows the 'MANAGE CASE' window with the following details: 'Student:' (empty), 'Reason(s):' (Referral: CFAA for Tutoring), 'Outcome:' (Choose), and a large text area for 'Comment:'. At the bottom, there is a checkbox for 'Allow closed comments to be shown in email', a 'Go Back' button, and a 'Submit' button.

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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

