## Managing Cases In Navigate –
## For Advisors, Academic Support, and Housing

- Open the Cases tab in Navigate on the left-side menu



- Filter by "Assigned To" your name and select Search to only see cases assigned to you or a specific person



- **Advisors Only:** You can select the check box beside "My Students Only" (far right-side) to view all cases for your assigned students, but this will include cases that outreach is being completed by another area/support group

- Alert Reasons:
  - Attendance/Engagement Issues and Student of Concern are assigned to the student's advisor
  - Low Homework/Assignment Grades is assigned to the PAC coordinator
  - Tutoring/SI Recommended is assigned to those coordinators
  - Writing and Communication Center Recommended is assigned to WCC
  - Housing Referral is assigned to the student's RD

- If it is helpful, sort the cases alphabetically by student by clicking the up/down arrows beside the column. So if a student has multiple cases for different classes, this will put the cases for the student beside each other in the list.



- You can contact the students individually or in bulk directly from the cases. Just select the students you want to send a message to and click the Action drop-down menu. Then choose "Send Message".
  - This will put a comment on each of the cases showing the contact attempted.
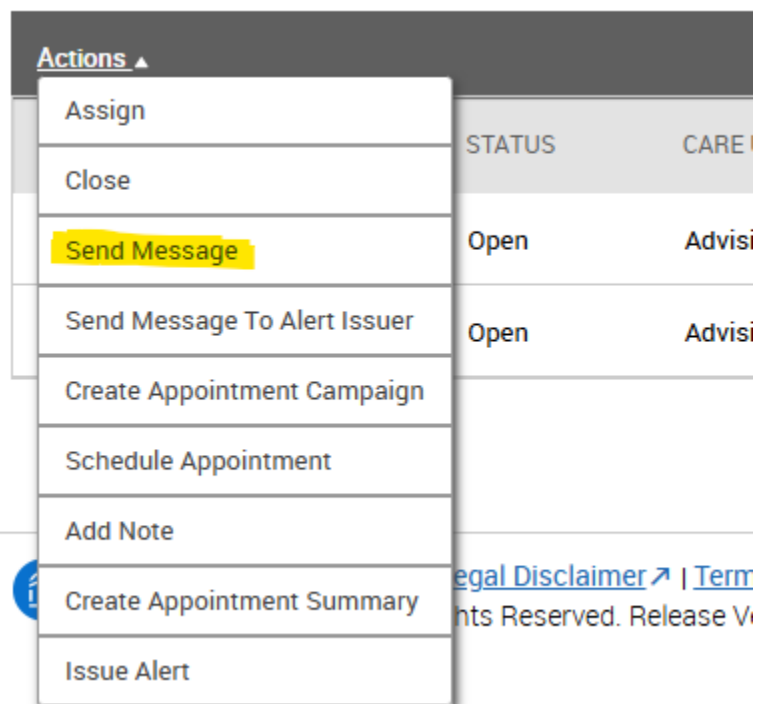
- Click on "Manage Case" to see all of the comments made for an individual case. If a professor listed any specific info about the student, it will be listed.



My Students Only

| ASSIGNED TO | CASE OWNER: |
|---|---|
| Melissa Tinkham | Manage Case |

**MANAGE CASE**                                          ✕

Owner

Select an owner ▾

Reason: Attendance/Engagement Issues
Class: ART-1000-0 Intro to Contemp Art Practices

Assignees

× Melissa Tinkham

Discard      Save Changes

**Case Activity:**

—————————————— 09/08/2025 ——————————————

⤴ Heath Schultz assigned case to Melissa Tinkham.                11:21am ET

💼 Heath Schultz opened case.                                    11:21am ET

💬 Heath Schultz added comment:                                  11:21am ET
   We have only had one graded assignment thus far. Their missing assignment is bring their grade down. No reason they
   can't catch up at this early stage.

Add Comment

cancel      **Close Case**

- Click "Add Comment" to include any information about outreach attempted



- For advisors and academic support, the expectation is two different attempts at outreach, with at least 48 hours in between. This can be emails, texts, phone calls or a meeting.
- When contact has been made with the student or if you do not receive a response after two or more attempts, close the case. Select "Close Case" when managing the case or select "Close" in the Action drop-down menu.
  - The option to Close in the Action drop-down menu will allow you to close multiple cases at the same time. Just be aware that it needs to be for the same closure Outcome and any comment included will be listed on each of the students selected.
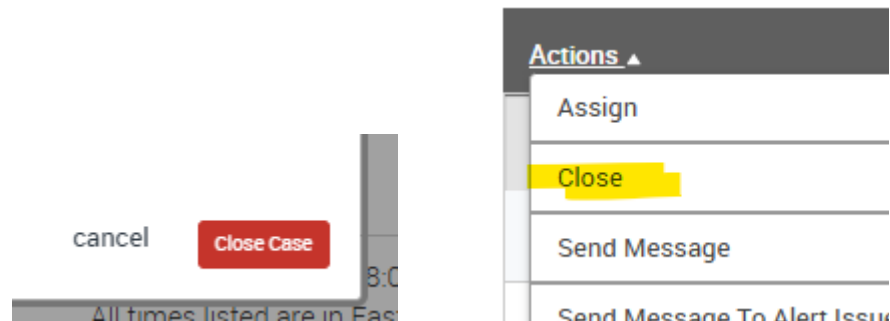


- When closing a case or multiple cases, select the Outcome of your outreach accordingly. Include a comment that includes more information for the professor (alert issuer).
  - Make sure to check the box to "Allow closed comments to be shown in email". This allows the professor to see the outcome and comments when closing the case.

## MANAGE CASE

Student: ▓▓▓▓▓▓

Reason(s): Attendance/Engagement Issues

Outcome: Choose ▾

Search: 🔍

- **Choose**
- Outreach Attempted- No Response from Student
- Student No-Showed
- Student Withdrew
- Multiple Cases for Same Class
- Case Archived
- Meaningful Contact Made

Comment:

☑ Allow closed con...

Go Back    Submit

## Helpful For Housing

- **Housing cases will not include the professor or advisor comments in the Housing Referral case.**
  - Housing will need to view the Student Profile - History to view any previous comments from professors and advisors
  - To view a Student Profile, click on the name of the student in the list of cases. Select History to view past alert information.
  - Select "Alerts for ...." In the "View As:" section to see just the information for other alerts for the student



| Overview | Success Progress | **History** | Courses | Calendar | List of Calendar Items | Appointments | Conversations |

### ▓▓To-Dos

**Actions ▾**                                                                    ☑ Hide Completed

| | TO-DO | DUE DATE | CREATED BY | CREATED ON | COMPLETED ON | COMPLETED BY | ACTIONS |
|---|---|---|---|---|---|---|---|
| ☐ | | | | | | | |

You have no upcoming or outstanding To-Dos.

### Alerts For ▓▓▓▓

View As: [Alerts for ▓▓▓ ▾]

| ISSUE DATE | ALERT REASONS | ISSUED BY | COMMENTS | CASES | PROGRESS REPORT | ACTIONS |
|---|---|---|---|---|---|---|
| 09/08/2025 | Attendance/Engagement Issues, Low Homework/Assignment Grades | Heath Schultz | We have only had one graded assignment thus far. Their missing assignment is bring their grade down. No reason they can't catch up at this early stage. | 2 Open Cases | Yes | |