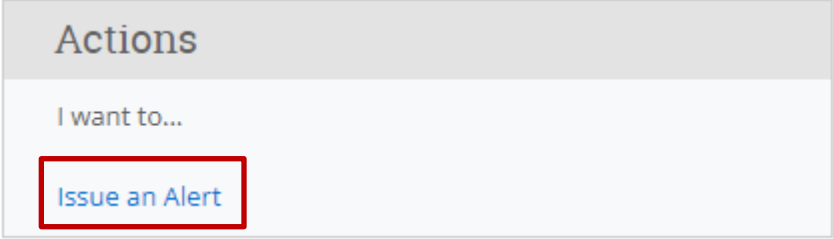
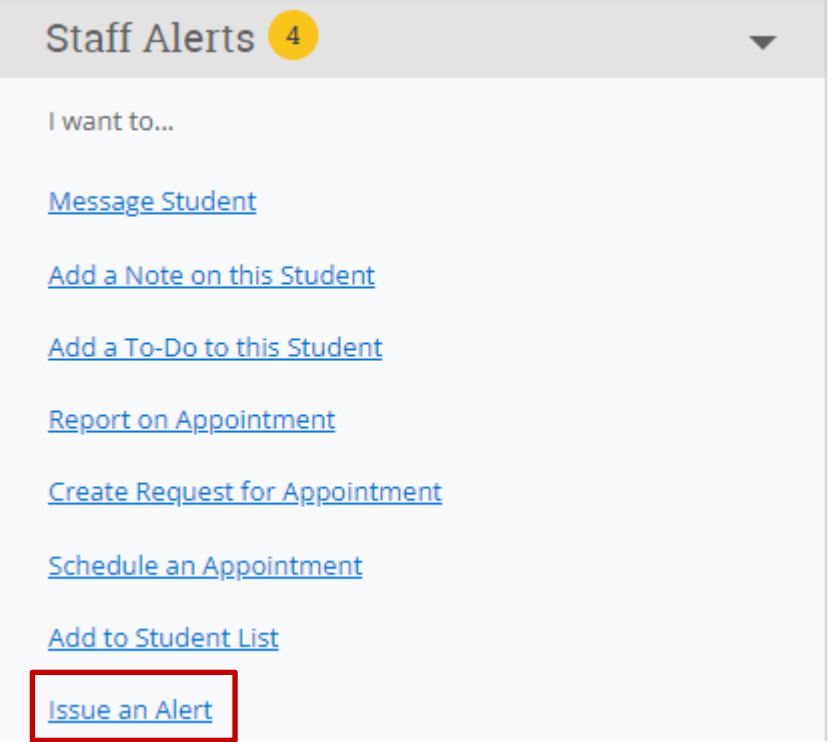


Date 6/21/2022

Creating a Case

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

<p>Ad Hoc Faculty/Staff Home</p> <ol style="list-style-type: none">1. Issued through the “Actions” panel on the “Faculty/Staff Home Page	
<p>Ad Hoc Student Overview Page</p> <ol style="list-style-type: none">1. Issued the “Staff Alerts” panel on a student’s overview page	

Step 1b. Issuing a Multiple Student Alert (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 Alert"

Search

Unsaved Student Search Save

Assigned To Advisor: Villegas, Andrea x

Search Modify Search

Actions ^	UMULATIVE GPA	MAJOR	PRE
Send a Message to Student		Business Admin	Unk
Create Ad hoc Appointment Summary	666	MS - MKT - BADK MS	
Appointment Campaign			
Schedule Appointment			
Tag		Child Development -	Low
Note	243	CHDD BA	
Mass Print			
Issue Alert	58	Kinesiology - KIN BS	Low
Add to Student List			
Show/Hide Columns			
Export Results	196	Bus Adm-BS-FIN & LAW - BADF BS	Low

Ad Hoc | Appointments Report

1. Open the "Appointments" report
2. Configure the report as needed
3. Click "Search"
4. Click the "Action" button to open the drop-down menu
5. Alert will be issued to all students appearing in the results, regardless if they have been selected or not
6. Click "Issue Alert"

Appointments

Report Information

Unsaved Report Save

Timeframe: Last 1 Year Report Mode: Appointments Include Cancelled Appointments Include No Shows

Search Modify Search

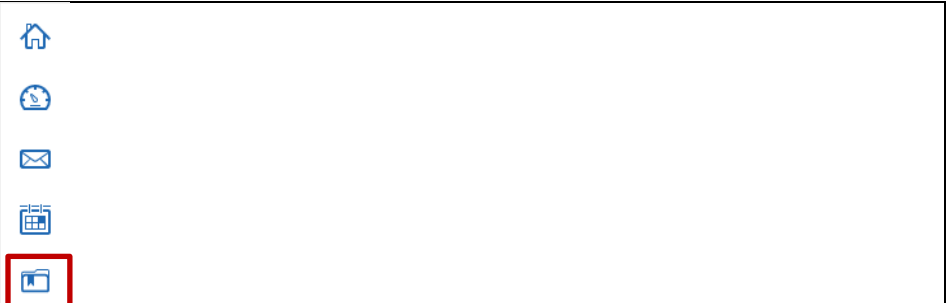
Actions ^	STUDENT ID	STUDENT ALTERNATE ID	CATEGORIES	TAG
Send a Message to Student			Career: Graduate,Good Standing,SAP for FinAid	
Create Ad hoc Appointment Summary			Status: Meets SAP,Transfer	Fall 15 Cohort
Appointment Campaign				
Schedule Appointment				
Tag				
Note				
Issue Alert				
Add to Student List				
Show/Hide Columns				
Export Results				

Step 2a. Defining an Alert

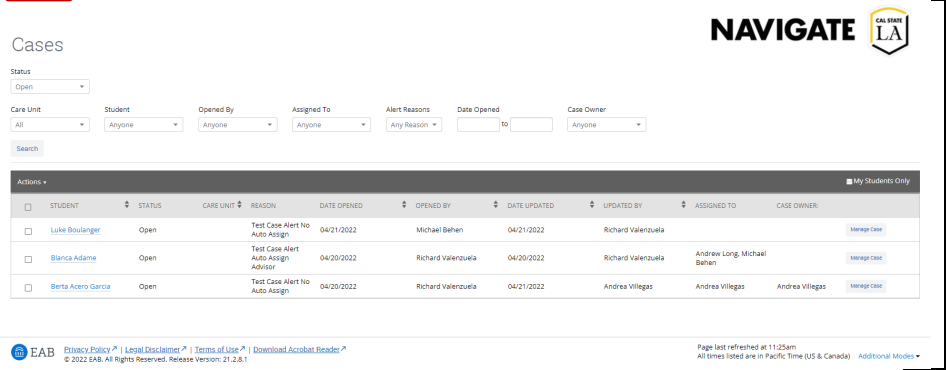
<ol style="list-style-type: none"> 1. After Clicking “Issue Alert” from the previous step, the “Issue Alert” card will pop-up. 2. Select an Alert Reason <ol style="list-style-type: none"> a. Alert Reason lists may not be the same as the seen-on Progress Report Reasons b. Alert Reason lists can vary from Care Unit to Care Unit depending on the User Permissions 	
<p>Optional Step</p> <ol style="list-style-type: none"> I. When Issuing an Alert for 1 student, the issuer has the added option of associating the alert to a course and section II. This step will not appear when using methods to create alerts for multiple students III. The list presented shows the selected student’s courses both current and past 	
<ol style="list-style-type: none"> 3. While it is not required by the card, it may be helpful to add a summary for the support staff serving this case 	
<ol style="list-style-type: none"> 4. Click “Submit” when ready to issue the Alert <ol style="list-style-type: none"> a. Note that not all Alerts will generate a case b. Some Alerts 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 an alert that will open a case 	

Step 3. Case Management

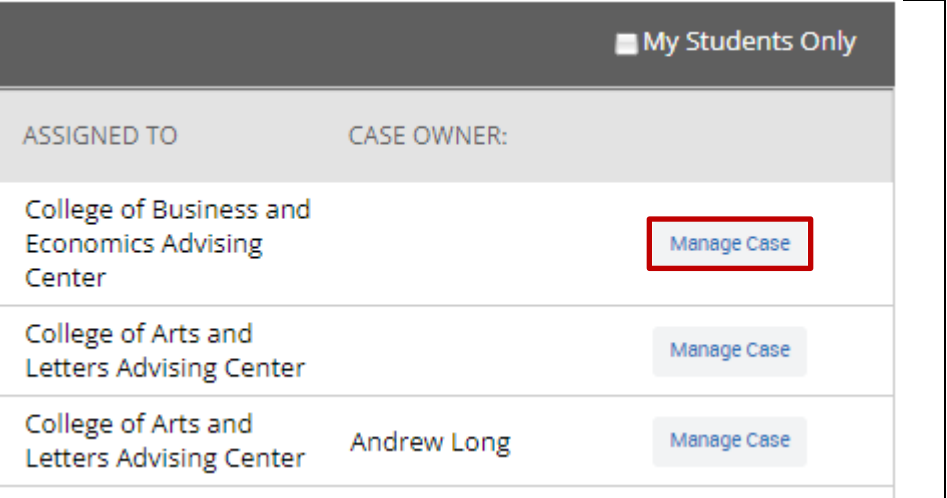
1. On the Staff Home Page, click on the File Folder Icon on the left Navigation bar
2. This will open the “Cases Page”



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



<p>7. Those with the User Role Permission to “Assign Cases to Other Users” will be able to modify the:</p> <ol style="list-style-type: none"> Owner – Staff member in charge of resolving the Case Assignees – Staff member(s) assisting with the resolution of the Case <p>8. Case Activity shows the chain of custody as well as the comments entered by staff supporting the case</p>	
<p>9. Updates can be entered with the grey “Add Comments” button</p> <p>10. A message box will open allowing the staff member to write a message</p>	
<p>11. Once comments are entered, click the blue highlighted “Add Comment” button</p> <p>12. Entries cannot be edited after submission</p> <p>13. There is no need to save after a comment is submitted. Close the “Manage Case” card if comments or staff assignments were the only changes being made</p> <p>14. To close the case, proceed to the next step</p>	
<p>15. To close the case, click on the red “Close Case” button on the bottom right most section of the “Manage Case” card</p>	