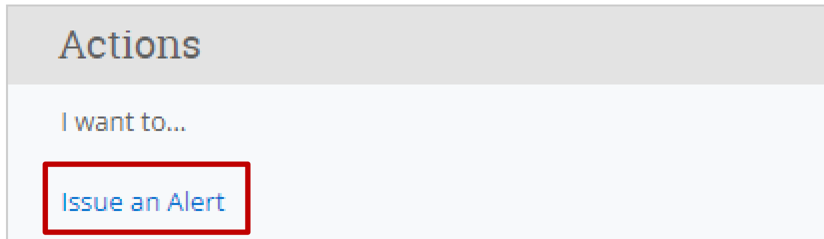
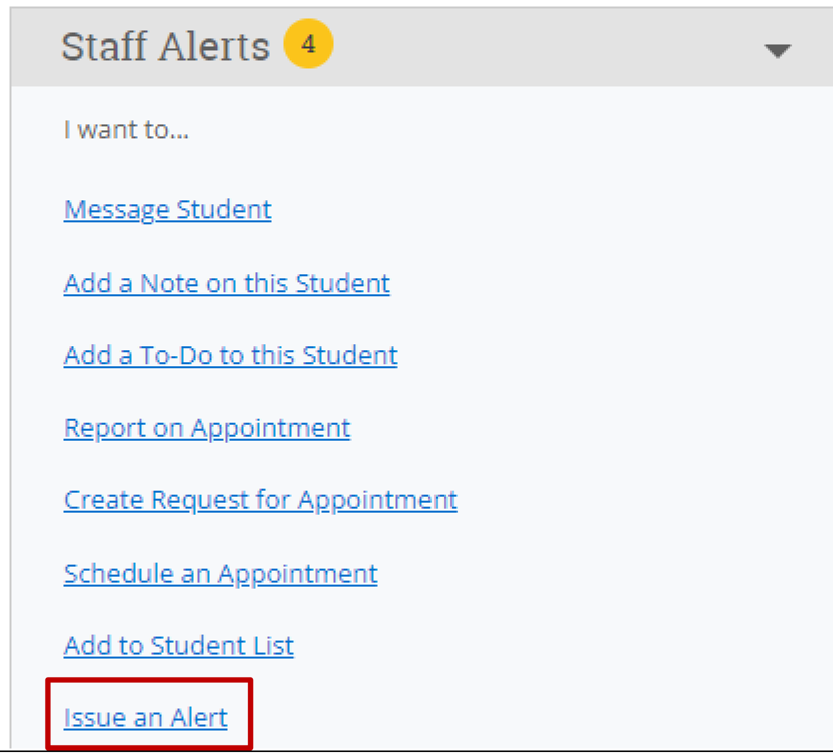
Date 6/21/2022

Creating a Case

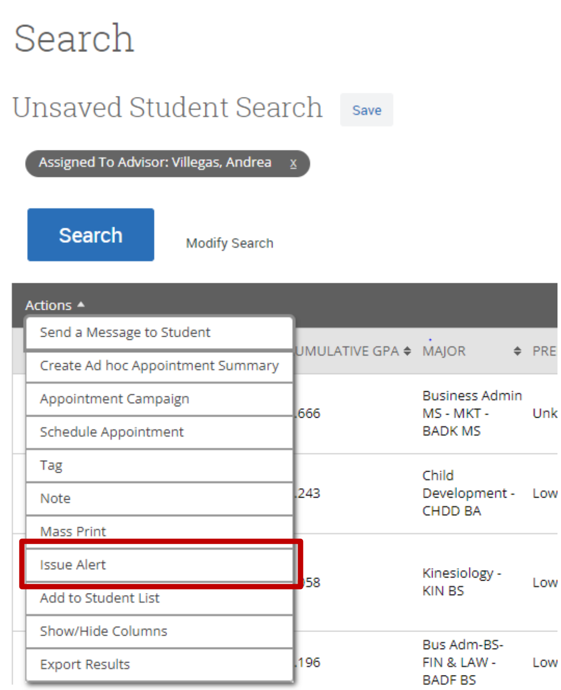
Step 1a. Issuing a Single Student Alert (Location and Methods)

Ad Hoc | Faculty/Staff Home 1. Issued through the “Actions” panel on the “Faulty/Staff Home Page	
Ad Hoc | Student Overview Page 1. Issued the “Staff Alerts” panel on a student’s overview page	

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

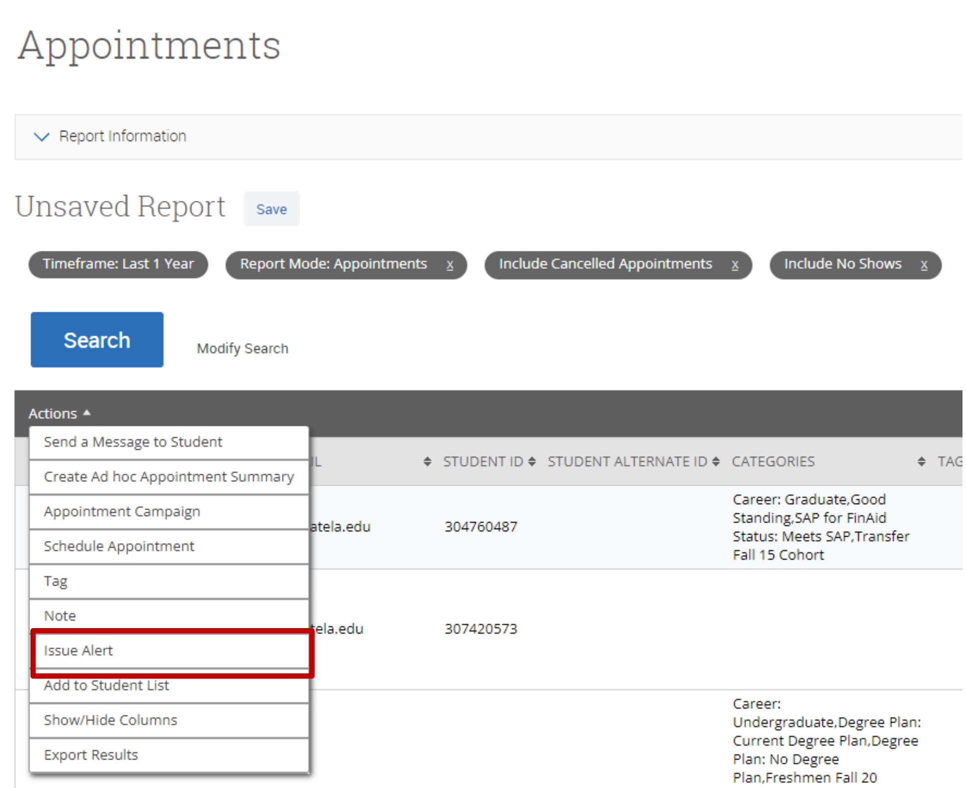
Ad Hoc | Advanced Search Result

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"



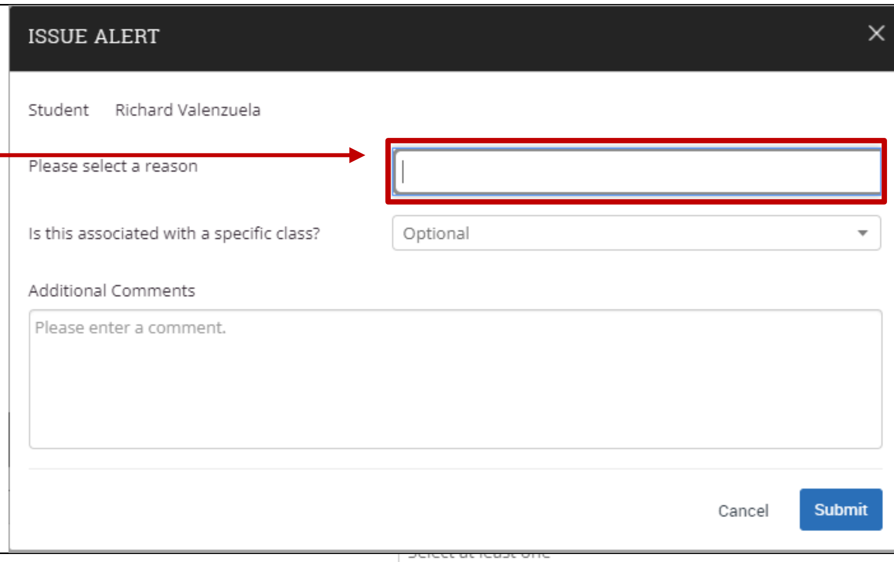
Ad Hoc | Appointments Report

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"



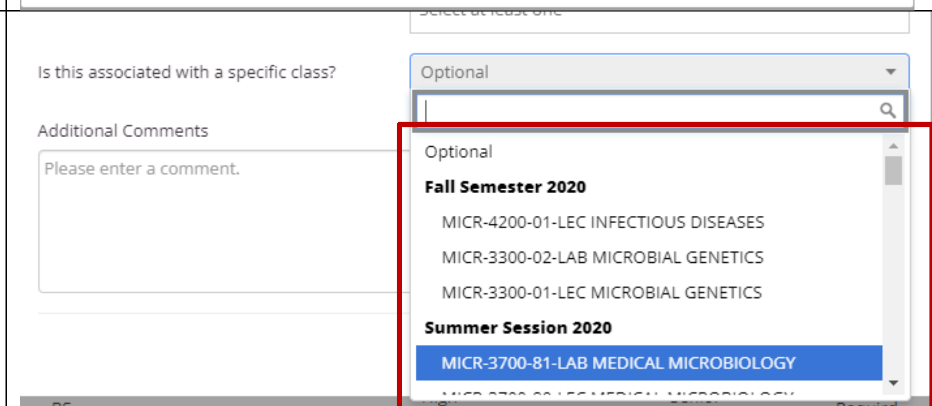
Step 2a. Defining an Alert

1. After Clicking "Issue Alert" from the previous step, the "Issue Alert" card will pop-up.
2. Select an Alert Reason
   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

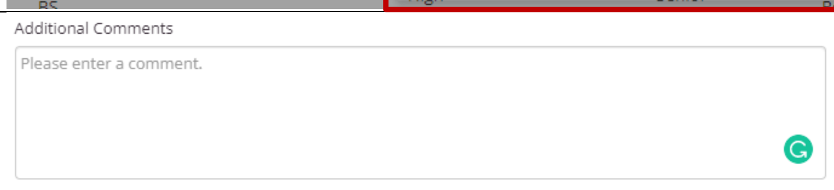


Optional Step

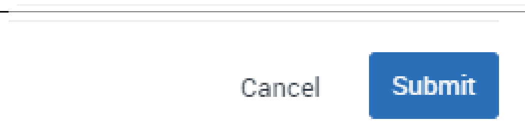
I. When Issuing an Alert for 1 student, the issuer has the added option of associating the alert to a course and section
II. This step will not appear when using methods to create alerts for multiple students
III. The list presented shows the selected student's courses both current and past



3. While it is not required by the card, it may be helpful to add a summary for the support staff serving this case



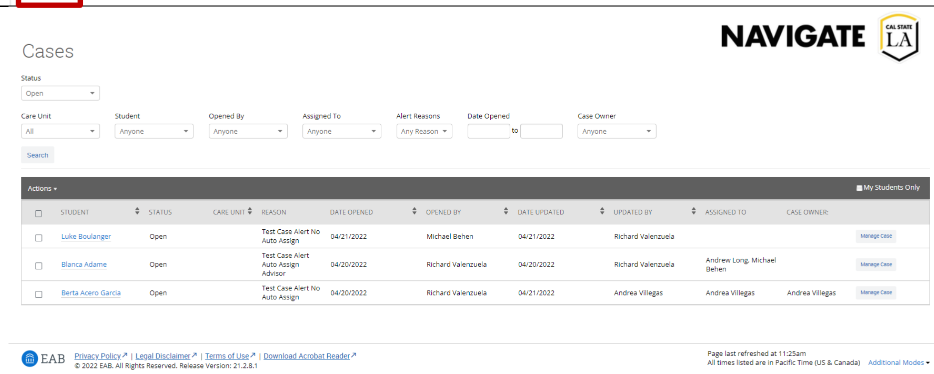
4. Click "Submit" when ready to issue the Alert
   a. Note that not all Alerts will generate a case
   b. Some Alerts could send an email notification to specific users without opening a case
   c. For the purpose of this document, it is assumed the intent was to issue an alert that will open a case



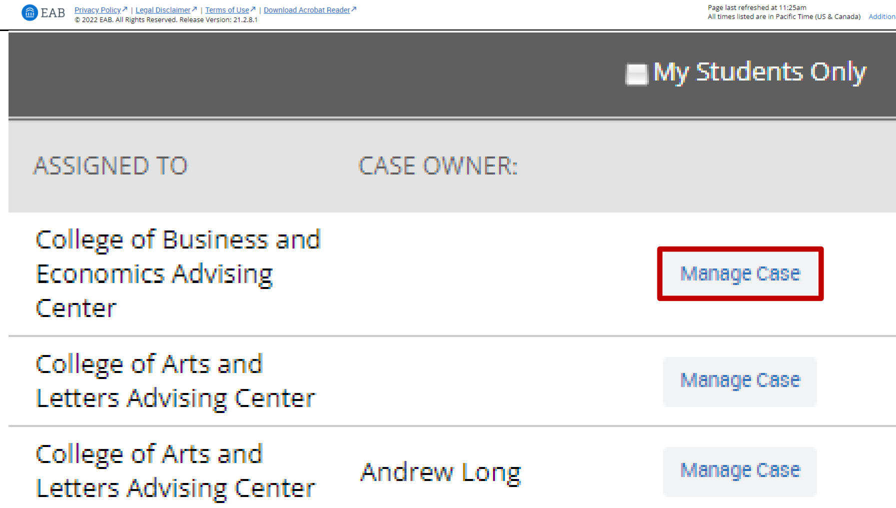
Step 3. Case Management

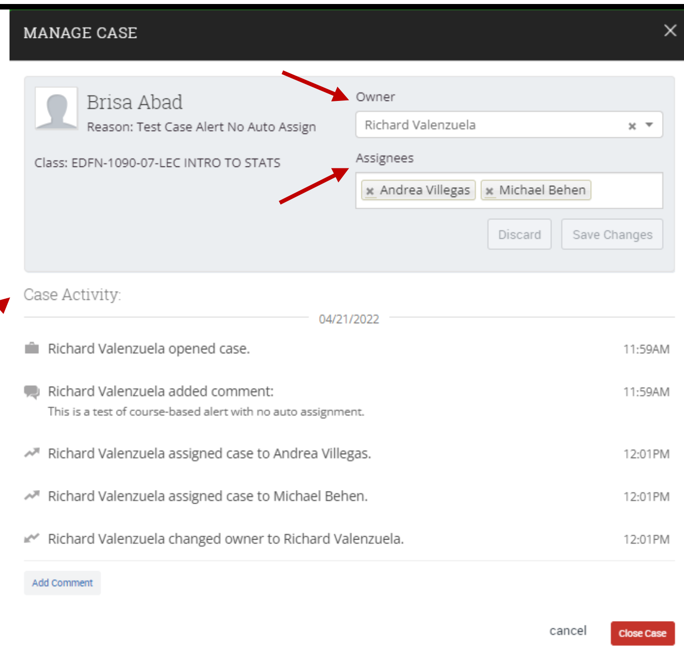
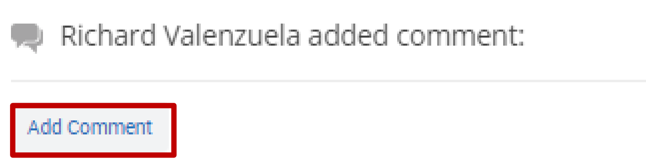
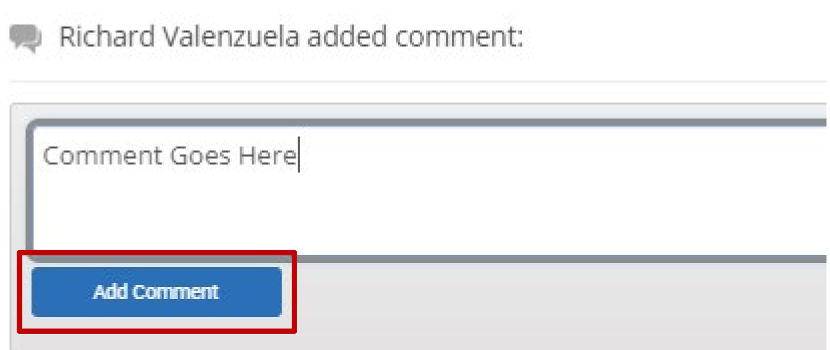
1. On the Staff Home Page, click on the File Folder Icon on the left Navigation bar
2. This will open the "Cases Page"

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



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. Updates can be entered with the grey "Add Comments" button 10. A message box will open allowing the staff member to write a message	
11. Once comments are entered, click the blue highlighted "Add Comment" button 12. Entries cannot be edited after submission 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 14. To close the case, proceed to the next step	
15. To close the case, click on the red "Close Case" button on the bottom right most section of the "Manage Case" card