
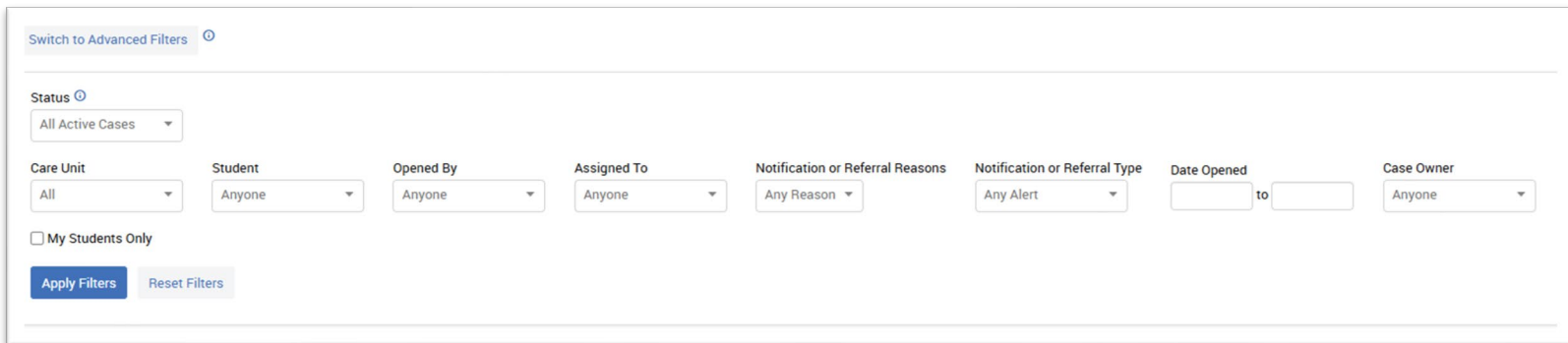



Navigate360: Manage Cases


Alerts are configured to automatically open a Case, 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 *Basic 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*
 - Search for *My Students Only* to filter for assigned students to a user's caseload
- After inputting filters, click *Apply Filters*
- Click *Switch to Advanced Filters* to use *V3 Reporting Fields* to filter your search



Switch to Advanced Filters 

Status 
All Active Cases

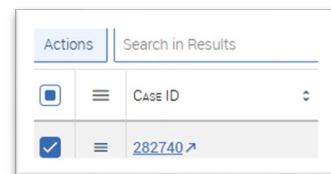
Care Unit: All | Student: Anyone | Opened By: Anyone | Assigned To: Anyone | Notification or Referral Reasons: Any Reason | Notification or Referral Type: Any Alert | Date Opened: [] to [] | Case Owner: Anyone

My Students Only

Apply Filters | Reset Filters

2. Manage Cases with Quick Actions

- Click the box beside a *Case ID* and an *Actions* button will appear. Take these Case-specific *Actions* to manage a *Case*:
 - *Assign* – Allows users to assign the case to a specific *Owner*.
 - *Update Status* – Allows users to update the status of the Case to *Closed* and provide the *Outcome* and *Comment(s)* for the closure resolution.
 - *Link Cases* – Allows users to link similar *Cases* together. Two Cases must be selected in order to link them.
 - *Send Message to Alert Issuer* – Allows the *Case Owner* or Manager to message the user who issued the alert.
 - *Delete Case(s)* – Allows users the delete a Case. However, do **NOT** delete a *Case* as this deletes valuable data.



Actions	Search in Results
<input type="checkbox"/>	Case ID
<input checked="" type="checkbox"/>	282740

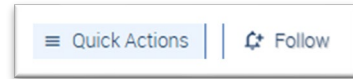
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3. Manage Cases in Detail

- Cases are assigned a *Case ID* that allows users to open a *Case Details* page in a separate browser by clicking the number.
- At the top of the *Manage Case [Case Number] for [Student Name]*, there is a *Quick Actions* button that allows users to take standard Navigate Actions, and a *Follow* button that allows users to receive notifications on case activity.
 - **NOTE:** Assignees and Owners will automatically receive notifications for the Case.
- The *Case Summary* box allows users to see what *Care Unit* and *Reason* the Case was opened for, who *Opened* the Case at what *Date and Time*, and who *Last Modified* the Case. The Case Summary further displays:
 - *Owner*
 - *Assignees*
 - *Case Status*
 - *Days Since Last Activity*
 - *Total Days Open*
- The *Edit Details* button allows the Case Owner to change the owner, assignee, and status of the case.



^ Case Summary Edit Details

Care Unit:	Reason: Referral:
Opened by	at 06/01/2026 3:47pm ET
Last Modified by	at 06/03/2026 3:04pm ET

Owner	Assignees	Case Status	Days Since Last Activity	Total Days Open
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- The *Case Activity* box allows users to view the *Case Activity* history and *+ Add Comment(s)* to provide updates on the case workflow.
 - **NOTE:** Clicking the box beside *Show Comments Only* filters the *Case Activity* history to only show Case comments.

^ Case Activity

Case Activity

Search by activity type (for example, "comment", "link", or "assign") to filter the entries shown.

+ Add Comment

Show Comments Only

Search Case Activity

Items

- The *Linked Cases* box shows related cases a Case Owner has linked. Case Owners can unlink cases in this section, open the linked Case, or Student Profile. Only 25 cases can be linked at a time.
 - **RECOMMENDATION:** Case Owners may think about linking Cases in the same Care Unit, if the student has multiple Cases opened. **EX:** A student has multiple Cases opened in the Tutoring Care Unit for multiple classes.
- The *Documents* box allows Case Owners to upload case related documents to the case.

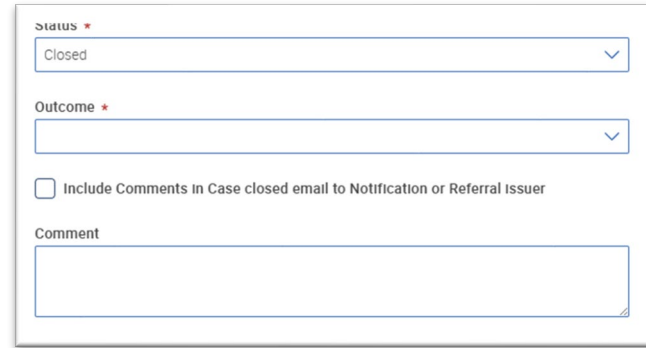
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4. Closing Cases

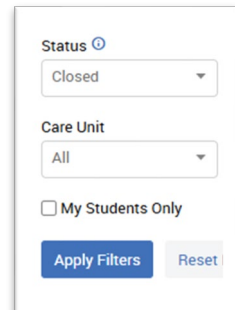
- When closing a Case through *Quick Actions* or *Edit Details* on a *Case Details* page, the Case Owner must select an *Outcome* for why the Case is being closed:
 - *Contacted student, but no reply*
 - *Student reports issue is already resolved*
 - *Student received or participated in support*
 - *Administrative case closure*
 - *DOS has received referral and is managing case in Advocate* (only to be used by the Dean of Students office)
- After selecting an *Outcome*, provide *Comment(s)* that support the Outcome, and check the box beside *Include Comments in Case closed email to Notification or Referral Issuer*.
- If Cases are linked, the Case Owner must select which Cases to close.



A screenshot of the 'Case Details' form for closing a case. It features a 'Status' dropdown menu with 'Closed' selected. Below it is an 'Outcome' dropdown menu. A checkbox labeled 'Include Comments in Case closed email to Notification or Referral Issuer' is present. At the bottom is a large text area for 'Comment'.

5. Reopening Cases

- To Reopen a Case, filter the *Status Basic Filter* to *Closed* and click *Apply Filters*.
- Click a *Case ID number* to open the *Case Details* page.
- Click the *Reopen Case* button in the *Case Summary* box to reopen the Case.



A screenshot of the filter panel. It includes a 'Status' dropdown menu with 'Closed' selected, a 'Care Unit' dropdown menu with 'All' selected, and a checkbox for 'My Students Only'. At the bottom are 'Apply Filters' and 'Reset' buttons.



A screenshot of the 'Case Summary' box. It shows a back arrow icon, the text 'Case Summary', and a 'Reopen Case' button in the top right corner.