

Date 4/2/2025

Creating a Case

Step 1a. Issuing a Single Student Referral (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>Actions</p> <p>I want to...</p> <p>Issue a Referral</p>
<p>Ad Hoc Student Overview Page</p> <ol style="list-style-type: none">1. Issued through the “Options” panel on a student’s overview page	<p>Options</p> <p>I want to...</p> <p>Message Student</p> <p>Add a Note on this Student</p> <p>Add a To-Do to this Student</p> <p>Report on Appointment</p> <p>Schedule an Appointment</p> <p>Add to Student List</p> <p>Issue a Referral</p>

Step 1b. Issuing a Multiple Student Referrals (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 Referral"

Assigned To College Advising Center: Advising Center, College of Business and Economics

[Search](#) [Modify Search](#)

Actions ^

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Mass Print
- Issue Referral
- Add to Student List
- Show/Hide Columns
- Export Results

BS-MGMT - BADM BS
BS-MKT - BADK BS
BS-MKT - BADK BS
BS-MKT - BADK BS
BS-MKT - BADK BS
BS-MKT - BADK BS
BS-ACCT - BADA BS
BS-FIN & LAW - BADF BS
BS-ACCT - BADA BS

Previous | 1 | 2 | 3 | 4 | 5 | ... | 37 | Next

Ad Hoc | Appointments Report

1. Open the "Appointments" report
2. Configure the report as needed
3. Click "Search"
4. Select one or more students
5. Click the "Action" button to open the drop-down menu
6. Click "Issue Referral"

Timeframe: Last 7 Days | Assigned To College Advising Center: Advising Center, College of Business and Economics

[Search](#) [Modify Search](#)

Actions ^

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Referral
- Add to Student List
- Show/Hide Columns
- Export Results

ATTENTION	MAJOR	HAD APPOINTMENT?	CARE UNIT	SCHEDULED SERVICES
Spring 2025)	Bus Adm-BS-MKT - BADK BS	Yes	Learning Assistance	Academic and General Writing Assistance
(Spring 2025)	Bus Adm-BS-MGMT - BADM BS	Yes	Undergraduate Advising	General Advising and Degree Planning
Spring 2025)	Bus Adm-BS-MKT - BADK BS	Yes	Undergraduate Advising	Explore or Declare Major/Minor
	Bus Adm-			

Previous | 1 | 2 | 3 | Next

Step 2a. Defining a Referral

<ol style="list-style-type: none"> After Clicking “Issue Referral” from the previous step, the “Issue Referral” card will pop-up. Select a Referral Reason <ol style="list-style-type: none"> Referral Reason lists may not be the same as the seen-on Progress Report Reasons Referral 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"> When issuing a referral for 1 student, the issuer has the added option of associating the Referral to a course and section This step will not appear when using methods to create Referrals for multiple students The list presented shows the selected student’s courses both current and past 	
<ol style="list-style-type: none"> While it is not required, it may be helpful to add a comment to add more context to the referral for the support staff assigned to this case 	
<ol style="list-style-type: none"> Click “Submit” when ready to issue the Referral <ol style="list-style-type: none"> Note that not all Referrals will generate a case Some Referrals could send an email notification to specific users without opening a case For the purpose of this document, it is assumed the intent was to issue a Referral 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

NAVIGATE

Cases

Status:

Care Unit: Student: Opened By: Assigned To: Alert Reason: Date Opened: to Case Owner:

Search

STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER	Actions
Luke Boulanger	Open		Text Case Alert No Auto Assign	04/21/2022	Michael Behan	04/21/2022	Richard Valenzuela			Manage Case
Blanca Adams	Open		Text Case Alert Auto Assign Advisor	04/20/2022	Richard Valenzuela	04/20/2022	Richard Valenzuela	Andrew Long, Michael Behan		Manage Case
Berta Acero Garcia	Open		Text Case Alert No Auto Assign	04/20/2022	Richard Valenzuela	04/21/2022	Andrea Villegas	Andrea Villegas	Andrea Villegas	Manage Case

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Page last refreshed at 11:25am. All times listed are in Pacific Time (US & Canada). Additional Modes

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

My Students Only

ASSIGNED TO: **College of Business and Economics Advising Center**

CASE OWNER: **Andrew Long**

Manage Case

College of Arts and Letters Advising Center

Manage Case

College of Arts and Letters Advising Center **Andrew Long**

Manage Case

- 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

MANAGE CASE

Richard Valenzuela
Reason: Change of Major - HHS

Owner
Select an owner

Assignees
* College of Health & Human Services Advising Center

Discard Save Changes

Case Activity:
04/02/2025

- Richard Valenzuela assigned case to College of Health & Human Services Advising Center. 8:43am PT
- Richard Valenzuela opened case. 8:43am PT
- Richard Valenzuela added comment: Student wants to switch to the Criminal Justice program 8:43am PT

Add Comment

cancel **Close Case**

- 9. Comments can be entered with the grey “Add Comments” button
- 10. A message box will open to write a comment

Richard Valenzuela added comment:

Add Comment

- 11. Once comments are entered, click the blue highlighted “Add Comment” button
- 12. Entries cannot be edited after submission
- 13. To close the case, proceed to the next step

Richard Valenzuela added comment:

Comment Goes Here|

Add Comment

Step 4. Closing a Case

1. To close a case, open the “Manage Case” card and click on the “Close Case” button on the bottom right most section of the card
2. Select an outcome
3. While it is not required, you may enter a “Comment” to catalog the actions and or reason the case is being close.
4. You may opt to add the closing comments to the outgoing email sent to the case issuer
 - a. Only the comments listed on the case closure will be sent via email.

Richard Valenzuela changed owner to Richard Valenzuela. 12:01 PM

Add Comment

cancel **Close Case**

MANAGE CASE [X]

Student: Richard Valenzuela

Reason(s): Change of Major - HHS

Outcome: Resolved Issue

Comment:
We have submitted the change of major request

Allow closed comments to be shown in email

Go Back Submit

Sample Email with Case Comment

From: Navigate360 (no-reply@navigate.eab.com)
To: Richard Valenzuela, via Email
Subject: Case Closed: Richard Valenzuela
Date: 04/02/2025 10:49am PT

Case Closed: Richard Valenzuela

Student
Richard Valenzuela

Referral Reasons
Change of Major - HHS

Referral Issued on
April 2

Case Outcome
Resolved Issue

Case Comments
We have submitted the change of major request

Closed by
Richard Valenzuela

Closed on Date
April 2