

Cases

Viewing & Managing Cases in Nanook Navigator

What is a case?

An electronic “case file” where staff and instructors can collaborate on the follow up with students. Cases create a more formalized next step for action or intervention on [progress reports](#) and [issued alerts](#). [See full key here](#).

Where are cases?

Open and closed cases are stored on the student’s profile page, the Cases page, and in Reports.

Who manages the cases?

See who manages the case based on the alert [here](#). Typically, most cases will be managed by the primary assigned advisor in SGAADVR.

Case Management Practices

[View case management video here](#) and [Nanook Navigator log in link here](#).

1. Cases are assigned automatically to advisors and staff.
2. Cases are to be **claimed** within **3 business days** of the **case open date**.
3. The primary academic advisor is to claim each case by making themselves the case owner.
4. If the primary academic advisor does not claim the case within 3 business days then a secondary advisor is to claim the case by making themselves the case owner status. (If another person is the case owner do not remove them).
5. If a student does not have an assigned advisor, Cassie Kendall will assign the case to the best of her ability or the [department account](#) will assign an advisor. If that student is maintaining an advisee relationship with one or all of the manually case assigned advisors then the advisor assignment is to be updated in SGAADVR. See [instructions here for updating Banner advisor assignments](#) or watch this [video](#).

Case Management Practices, continued

6. Cases are to be **managed & closed** within **2 weeks** of the **case open date**.
7. Cases are considered “managed” when an advisor has **made up to two attempts** to reach out and support the student’s concerns, questions, barriers or needs.
8. Cases are considered “closed” within 2 weeks of the case open date no matter the outcome. [See outcomes key on pages 73-74](#).
9. **If you are concerned about the student’s safety** you may report this concern to the [Office of Rights, Compliance and Accountability](#) or add Nikki Crenshaw to the case and provide a comment.
10. If a case has not been claimed within 3 business days or closed after two weeks of assignment then Cassie Kendall will be checking in.
11. Cases still open 2 weeks after the semester end date will be closed out by a Nanook Navigator admin.

Managing a Case From Email Link

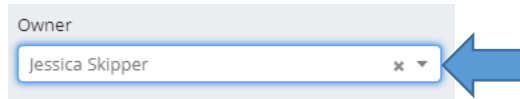
1. You will receive an email at your alaska.edu account with the subject line [Case Assigned] *Alert Reason for Student Name*. Within the email is the student’s name, alert reason, alert issued by and a link to view the case details.
2. Click on the “View Case Details” link in the email.
3. Sign in with your UA credentials (same as UAOnline).
4. The case will open for that student. Please read the comments provided by the alert issuer and other student care members.

***Note: a student may have multiple cases open at the same time. See other cases by clicking on the X on the top right of the individual case window.**

Cases

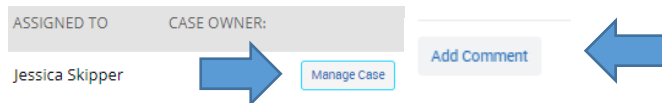
Managing a Case From Email Link, continued

- Primary advisor update the case ownership (within 3 business days).



- Secondary advisor, if you do not see an advisor comment or case owner from the primary advisor after 3 business then claim the case.

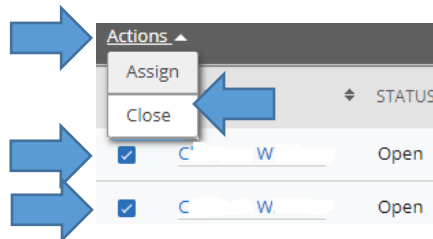
- Provide any updates in the student case by adding comments.



- Manage the case and close within 2 weeks case open date. [Template communications for outreach.](#)

- To view alerts and cases on student profiles see steps [here \(pg. 2\)](#).

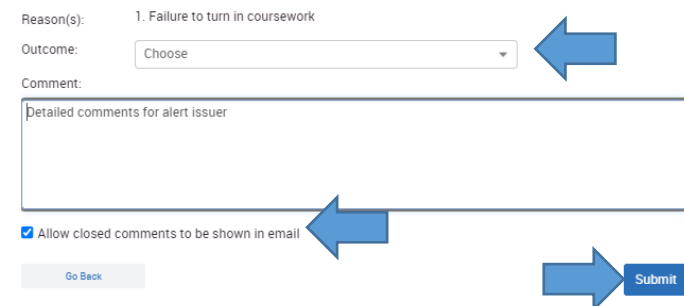
- Click on close case within individual the case. You can also close multiple cases at the same time on the cases window by checking the boxes, clicking "Actions" and click "Close". ***Note: if you close multiple cases they will need to be the same outcome and final comment (optional). If you click assign, this will remove all currently assigned staff.**



	STATUS
<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Open

Managing a Case From Email Link, continued

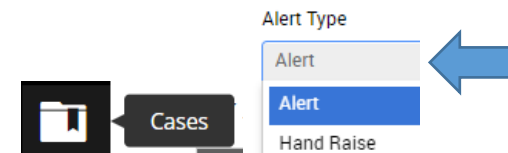
- Choose outcome of the case, check the box for closed comments, and provide final comments for alert issuer. See key on [pages 73-74](#) for more details.



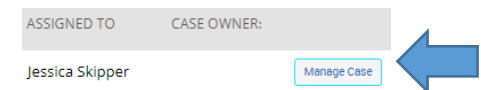
- Click submit to close the case/s.
- The alert issuer will receive an email that the case has been closed, with comments (as long as box was checked).

Managing a Case From Staff Home Page

- On the Staff Home page, click on the cases icon on the left-side panel. Choose to view alert or student hand raise cases.



- Click on "Manage Case" and add comments or close.

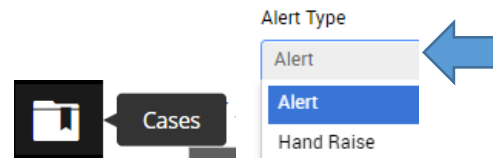


- Follow steps 5-12 from the "Managing a case from email link" section.
- To view alerts and cases on student profiles see steps [here \(pg. 2\)](#).

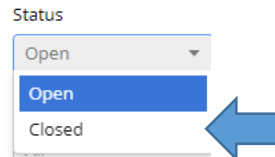
Cases

Manage Closed Cases from Staff Home Role

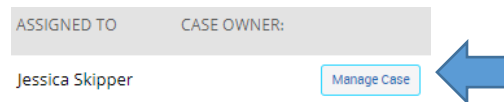
5. On the Staff Home page, click on the cases icon on the left-side panel. Choose to view alert or student hand raise cases.



6. Click on the "Status" filter dropdown and click "closed".



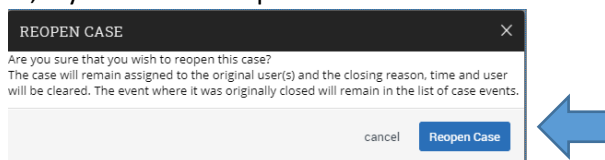
7. Click on "Manage Case" for the student case you would like to view or reopen.



8. When the manage case screen opens you are able to reopen the case by clicking "reopen case" in the bottom right corner.



9. A reopen case window with pop up, click reopen case, if you need to reopen.



10. The case will now be located in the open status cases.

Cases

Frequently Asked Questions (FAQs)

Why do progress reports create cases?

- At-risk progress reports create cases for advisors to reach out to the student in an effort to intervene with the student **before** important dates. Important dates include reaching out to the student before the add/drop date, drop for non-payment, and before the withdrawal deadline.

When do I close a case?

- Within 2 weeks of the case open date regardless of the outcome. Advisor must manually close out the case, see instructions above. [See the alerts and case intervention guide for more information.](#)

Why am I getting cases assigned to me?

- Nanook Navigator automatically assigns cases to assigned advisors indicated in Banner (SGAADVR). See [instructions here for updating Banner advisor assignments](#) or watch this [video](#). See the [alerts and case intervention guide](#) for more information on the automated settings for each alert reason.

What do I do if I am student's instructor and advisor; do I need to manage the case?

- Yes, if you are the primary advisors please continue to reach out to the student. If you have been actively reaching out as the instructor please close the case and leave a final comment that you are working with the student.
- If the student has been unresponsive to you as the instructor and advisor and you are concerned then you may report this concern to the [Office of Rights, Compliance, and Accountability](#) and close the case in Nanook Navigator.

I am managing a department/unit account should I be utilizing this to encourage our own staff to manage their cases?

- Yes, please see the [department/unit account case management handout here.](#)

Does the instructor or issuer see the case comments or final comments?

- Alert issuer will only see the final comment as long as the case manager checks the "Allow closed comments to be shown in email" box when closing out the case.

Can I see closed cases or reopen a closed case?

- Yes, please see instructions on page 3- Manage Closed Cases from Staff Home Role.

How do I know which alert reasons create cases and which don't?

- See the [alerts and case intervention guide](#) for more information on the alert and case settings.

Alerts and Case Intervention Key

*See this key for more information on
alerts, case intervention, automated items & student emails*