

# Cases (Unit/Department Account Managers)

## *Unit/Department Account Managers-Viewing & Managing Cases (triage & outreach) in Nanook Navigator*

### What is a case?

An electronic “case file” where staff and instructors across departments (e.g., financial aid, bursar, tutoring, and advising) can coordinate and collaborate on the follow up with students. Cases create a more formalized next step for action or intervention on [at-risk progress reports](#) and [issued alerts](#).

### 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?

The primary assigned advisor in the Banner screen SGAADVR for each student. When the primary advisor is unable to manage the case/s then a secondary advisor is to step in. Unit/Department account managers may also manage the cases. [See advisor case management handout for more information.](#)

### Case Management Practices

1. Cases are assigned automatically to all of the assigned academic advisors indicated in Banner (SGAADVR).
2. Cases are to be **claimed** within **3 business days** of receiving the **case assignment**.
3. The primary academic advisor is to access each case and claim each case by themselves the owner of the case.
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 in Banner, the department account admin should assign the case to the correct 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 and closed** within **2 weeks** of receiving the **case assignment**.
7. Cases are considered “managed” when an advisor has **made two attempts** to reach out and support the student’s concerns, questions, barriers or needs.
8. Cases are considered “closed” when the student has been referred to another staff member, instructor, or care unit; student contacted, student took recommended action; student contacted, no response; or student resolved on their own within the 2 weeks. Advisor must **manually close out the case**, see instructions below.
9. **If the advisor receives no response from a student and they are concerned** then they may report this concern to the [Center for Student Rights and Responsibilities team](#) and close the case in Nanook Navigator.
10. If a case has not been claimed within 3 business days or closed after two weeks of assignment then the [department account managers](#) should send an email to the assigned advisors with a follow-up and check-in.
11. Cases still open 2 weeks after the semester end date will be closed out by a Nanook Navigator admin.

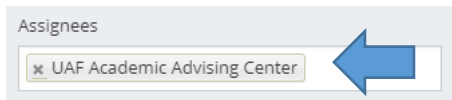
### Managing a Case From Email Link

1. When a case has been assigned, the advisor receives an automated email to their 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 using the [UA Department Email](#) credentials.
4. The case will open for that student.
5. If the case does not have an individual advisor assigned to the case then you will need assign the student’s advisor to the case. No individual advisor being auto assigned to the case means the student is missing their advisor assignment in Banner (SGAADVR).

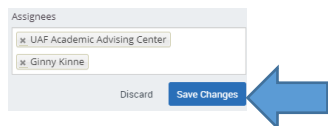
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## Managing a Case From Email Link, continued

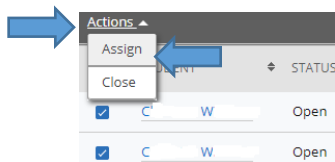
6. While the case is open, click in the assignees box and start typing the name of the advisor you wish to assign this case to in addition to the unit/department. Click on the advisor's name. You can add multiple advisors to the case.



7. Only the person claiming the case should be adding themselves as the owner, this indicates they have seen this case.
8. Once you have the set of advisors you wish to assign the case to, click save changes. Click "cancel" at the bottom of the screen to leave the student's case window



9. **Do not do:** If you click assign through the actions button, this will remove all currently assigned staff.

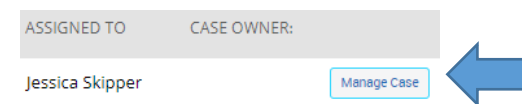


## Managing a Case From Staff Home Page

1. On the Staff Home page, click on the cases icon on the left-side panel.



2. Click on "Manage Case" for the student case you would like to view, add comments to or close.



3. Follow steps 5-7 from the previous section and case management practices above.

## Reviewing Open Cases & Prompting Assigned Advisors

1. Cases are to be **claimed by an individual advisor** within **3 business days** of receiving the **case assignment**.
2. Cases are to be **managed and closed by an individual advisor** within **2 weeks** of receiving the **case assignment**.
3. Department account managers are responsible for prompting advisors who have not claimed through the comment system. Advisors that have not claimed their cases should be sent a follow-up and check-in email by the unit/department account manager.
4. For students that are missing an individual advisor assignment in Banner, please see the "Update Advisor Assignment" box on this site: <https://uaf.edu/gs/nanooknavigator/advisors.php>
5. Here is a handout on [how advisors are able to manage their cases](#).
6. If advisors are not responding to the cases or the department account manager nudges please let the unit/department supervisor know and Jessica Skipper or Holly McDonald. We will be able to work together to provide outreach to the students.