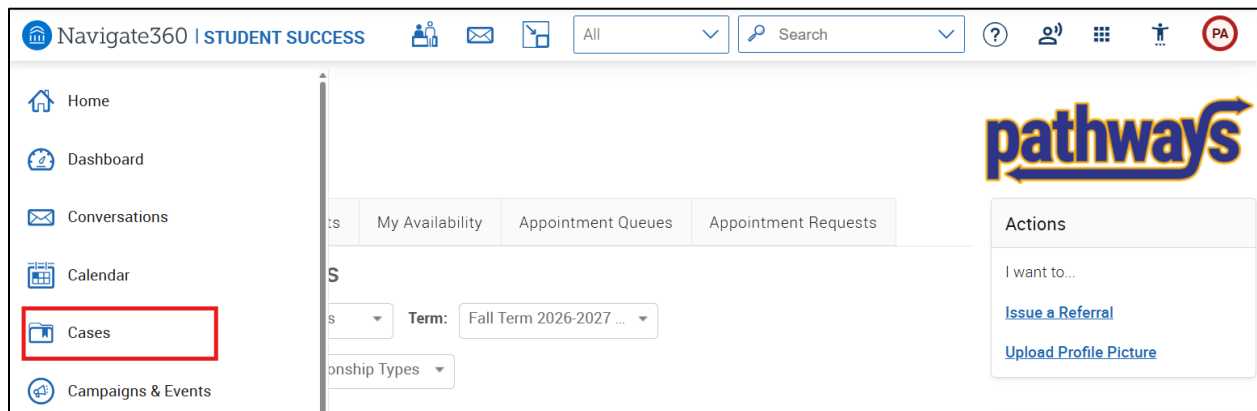


How to Manage a Case (Opened from a Referral)

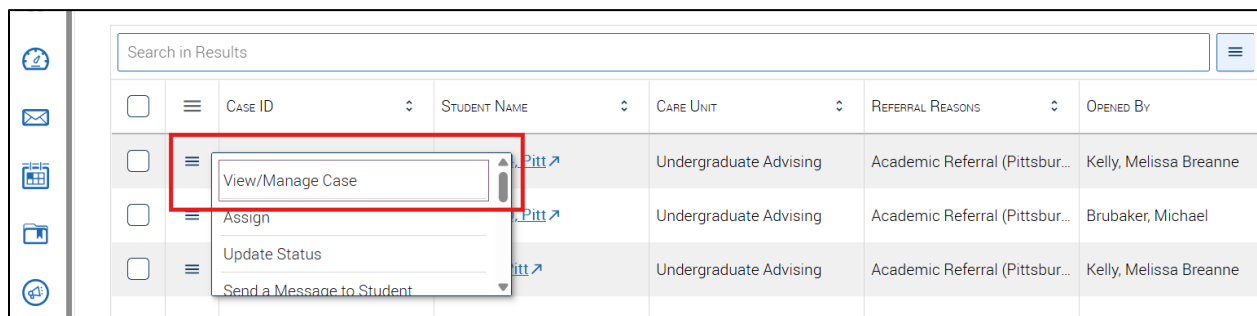
The Case Management process allows for intentional follow-up and documentation of support and outcomes. The final step is to close the case, which completes the communication loop with the person who issued the referral by sending them an automated email which includes any comments made visible to them and the case outcome.

Accessing and Navigating the Cases and Case Details Pages

An **email** will be sent to you when you are assigned to a Case. Use the link to log into Pathways to manage the Case. You can also access cases from the **Cases** section of Pathways found in the left-hand menu.



From the main Cases page, click the menu button to the left of a case to access available case actions. Common actions include managing the case, updating statuses, updating case assignees, and sending messages.



(continued on next page)

Bulk actions can also be taken from the main Cases page. Select the desired cases using the checkboxes, and then click the Actions button.

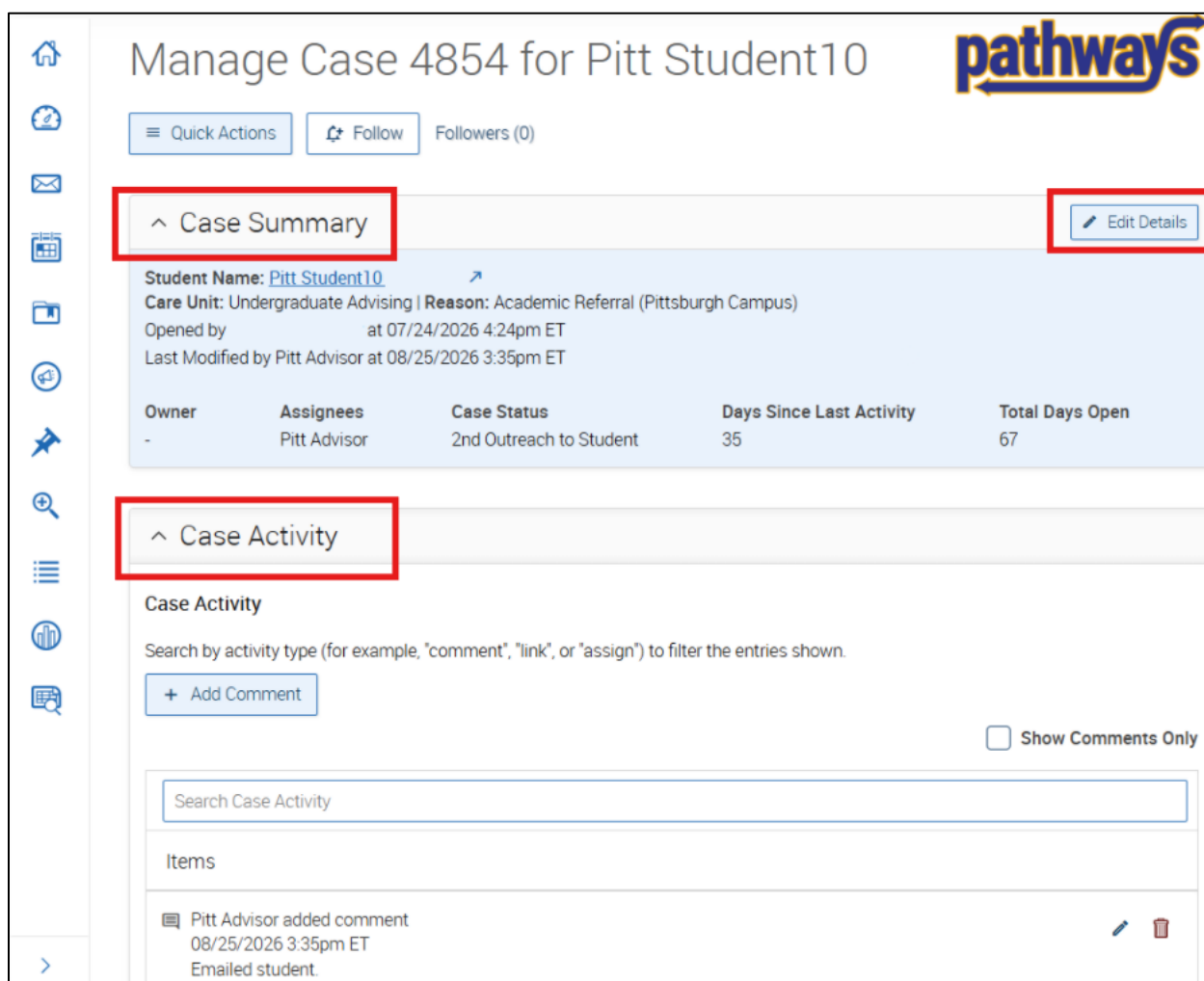


Actions

Search in Results

☒		CASE ID	↕	STUDENT NAME	↕	CARE UNIT	↕	REFERRAL REASONS	↕	OPENED BY
☒		4856 ↗		Student14.Pitt ↗		Undergraduate Advising		Academic Referral (Pittsbur...		Kelly, Meli
☒		4854 ↗		Student10.Pitt ↗		Undergraduate Advising		Academic Referral (Pittsbur...		Brubaker, I
☒		4848 ↗		Student.Pitt ↗		Undergraduate Advising		Academic Referral (Pittsbur...		Kelly, Meli

Clicking 'View/Manage Case' from the menu options, or clicking on the Case ID number will open a new Case Details page in a separate tab. This page includes Case Summary, Case Activity, and expanded details and functionality. Users with appropriate permission can **Edit Details** in this section.



Manage Case 4854 for Pitt Student10

[Quick Actions](#) [Follow](#) Followers (0)

Case Summary [Edit Details](#)

Student Name: [Pitt Student10](#)
Care Unit: Undergraduate Advising | Reason: Academic Referral (Pittsburgh Campus)
Opened by at 07/24/2026 4:24pm ET
Last Modified by Pitt Advisor at 08/25/2026 3:35pm ET

Owner	Assignees	Case Status	Days Since Last Activity	Total Days Open
-	Pitt Advisor	2nd Outreach to Student	35	67

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

- Pitt Advisor added comment
08/25/2026 3:35pm ET
Emailed student.

Managing and Closing Cases from the Case Details Page

The **Edit Case Details** panel allows the user to edit all aspects of the case. This includes:

- Update case owners
- Assign or reassign cases
- Update case status, including Closing the Case
- Add comments

The screenshot shows the 'Edit Case Details' modal for Case 485. The modal is overlaid on the 'Manage Case 485' page. The modal contains the following fields:

- Owner:** A dropdown menu.
- Assignees:** A multi-select dropdown menu with 'Pitt Advisor' selected.
- Status *:** A dropdown menu with '2nd Outreach to Student' selected.
- Comment:** A text area.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

The modal is titled 'Edit Case Details' and has a close button (X) in the top right corner. The background page shows the 'Case Summary' section with details for 'Pitt Student10' and a table for 'Case Activity'.

Interim case statuses are used to better monitor the ongoing progress of a case. Statuses do not need to be used sequentially; update the case to whichever status best reflects its current progress. Follow your individual unit's recommended actions and follow-up.

This screenshot shows the 'Status' dropdown menu from the 'Edit Case Details' modal. The dropdown is open, showing a list of status options. The '2nd Outreach to Student' option is highlighted. The list of status options includes:

- 2nd Outreach to Student
- New
- 1st Outreach to Student
- 2nd Outreach to Student** (highlighted)
- 3rd Outreach to Student
- Student Meeting Scheduled
- Updated Case Assignee(s)

The dropdown menu is titled 'Status *' and has a close button (X) in the top right corner. The background page shows the 'Case Summary' section with details for 'Pitt Student10' and a table for 'Case Activity'.

To **close a case**, you must update the status to 'closed'. Closing the case sends an email to the person who issued the referral. When appropriate, **select the box to "Include Comments in Case closed email to Referral issuer."**

If you select this box, any comments that you make when you close the case will be included in the Case Closed email. The Case Closed reason will always be visible in this email.

The screenshot shows the 'Edit Case Details' modal for Case 4854. The modal is open over a 'Manage Case' page. The 'Status' dropdown is set to 'Closed'. The 'Outcome' dropdown is set to 'Engaged with student, discussed intervention resources'. The checkbox 'Include Comments in Case closed email to Referral issuer' is checked. A text area for 'Comment' contains the text: 'I met with student and we discussed options for moving forward and additional resources on campus'. The 'Save' button is highlighted in blue.

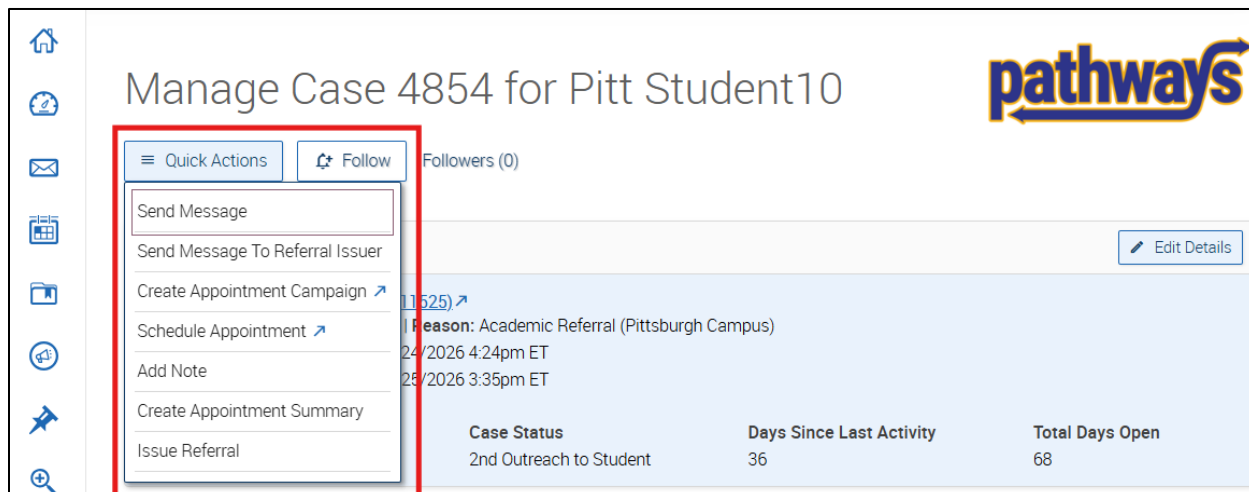
Notes about comment visibility: The person who issued the referral cannot see general comments that you add to the case. If you would like to communicate anything to the person who issued the referral, you will need to message or email them separately. Comments are for documentation purposes only – they are not a “conversation,” even though the initial comment may make it seem as such.

The only comment that you can make visible to the person who issued the referral is the Case Closed Comment.

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Other Case Management Actions and Information

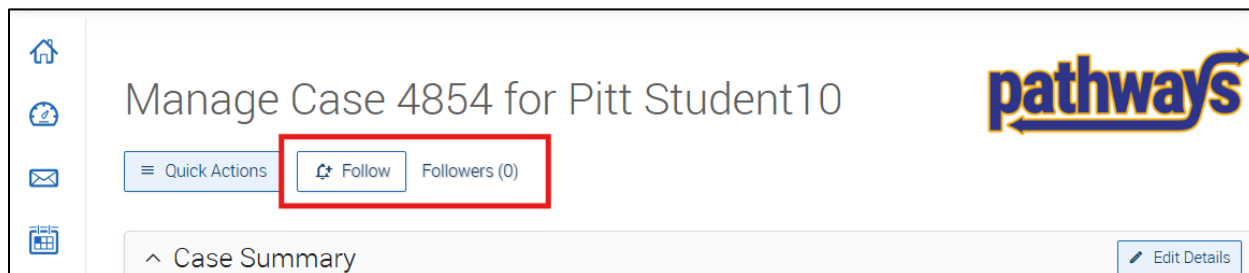
The Quick Actions button located at the top of the page allows users to take a variety of actions such as messaging the student or referral issuer or adding a note.



The screenshot shows the 'Manage Case 4854 for Pitt Student10' page. The 'pathways' logo is in the top right. On the left is a sidebar with icons. At the top of the main content area are two buttons: 'Quick Actions' and 'Follow'. The 'Quick Actions' button is highlighted with a red box, and its dropdown menu is open, showing the following options: 'Send Message', 'Send Message To Referral Issuer', 'Create Appointment Campaign', 'Schedule Appointment', 'Add Note', 'Create Appointment Summary', and 'Issue Referral'. To the right of the menu is a 'Followers (0)' label. Below the buttons is a section for case details, including a date and time '11/25/2025 4:24pm ET' and a reason 'Reason: Academic Referral (Pittsburgh Campus)'. At the bottom is a table with case status and activity information.

Case Status	Days Since Last Activity	Total Days Open
2nd Outreach to Student	36	68

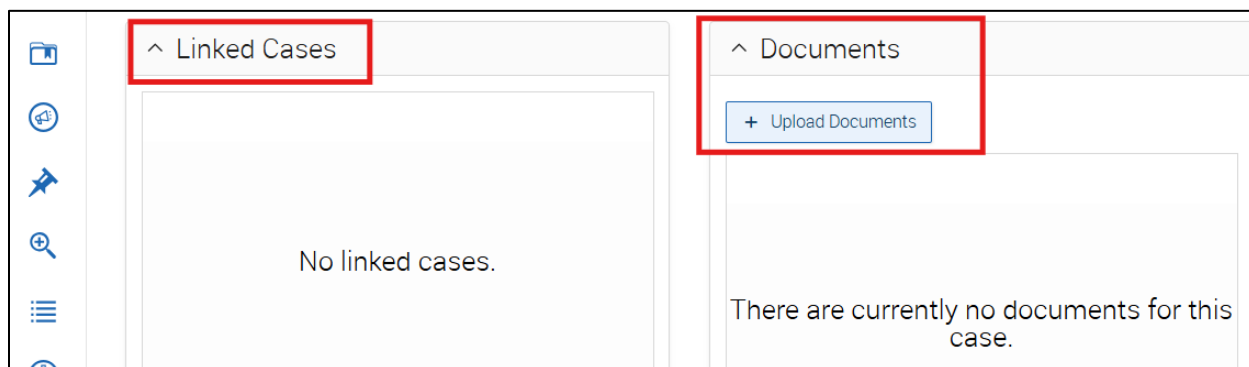
The **Follow** button allows users with permission to view the case to receive notifications when action is taken on a Case. Case assignees and owners will continue to receive notifications as expected.



The screenshot shows the 'Manage Case 4854 for Pitt Student10' page. The 'pathways' logo is in the top right. On the left is a sidebar with icons. At the top of the main content area are two buttons: 'Quick Actions' and 'Follow'. The 'Follow' button is highlighted with a red box, and it shows 'Followers (0)' next to it. Below the buttons is a section for case details, including a date and time '11/25/2025 4:24pm ET' and a reason 'Reason: Academic Referral (Pittsburgh Campus)'. At the bottom is a table with case status and activity information.

Case Status	Days Since Last Activity	Total Days Open
2nd Outreach to Student	36	68

At the bottom of the Case Details Page, you will see any linked cases and existing documents associated with the case. This is also where you can upload documentation.



The screenshot shows the bottom of the Case Details Page. There are two main sections: 'Linked Cases' and 'Documents'. The 'Linked Cases' section is highlighted with a red box and contains the text 'No linked cases.' The 'Documents' section is also highlighted with a red box and contains an 'Upload Documents' button and the text 'There are currently no documents for this case.'

Reminder emails are sent to case assignees and owners after 5 days of inactivity.



Cases Awaiting Action



^ 07/17/2026 8:00am ET From: Reply, No



From: Navigate360 (no-reply@navigate.eab.com)
To: [Pitt Advisor](#) via Email
Subject: Cases Awaiting Action
Date: 07/17/2026 8:00am ET

Cases Awaiting Action

1 case you are associated with are awaiting action. Please review and follow up as needed.

Case ID: 4848
Student: Pitt Student
Referral Reasons: Academic Referral (Pittsburgh Campus)