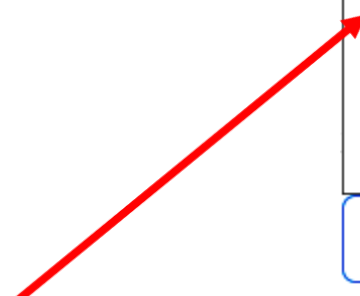


Closing The Case

- Once a Case Owner (Advisor) has worked with the advisee to their mutual satisfaction, it's time to close the case.
- The Case Owner will choose "Close the Case" from the available action items and will provide a Closure Reason.
- There are slightly different reasons for each case type chosen when the contribution was made.
- The chart below illustrates the Closure Reason for the various categories of case types.
- If an advisee has multiple advisors, the first advisor to close the case closes it for all assigned advisors.



Choose an action...

Add a Note

Add Another Type to Case

Send an Email (do not use)

Change Priority (do not use)

Close the Case

Reassign Case

Set a Reminder

Remove Reminder Dates

Choose an action...

▼

Case Closure Action Options

Closure Reason	Category
Student Has Improved Participation	Academic
Student's Attendance in Class Has Improved	Academic
Student Met with Advisor and Discussed Options	Academic
Met with Accessibility/Arranged Accomodations	Academic
Met with Advisor, Addressing Concerns with Instructor	Academic
Student Withdrew From Course	Academic, Miscellaneous
Student Competed Total Withdraw	All
End of Term	All
Student Met with Financial Aid	Finances
Met with Advisor, Referral/Options Provided	Finances
Met with Advisor/Fpantry Referral Made	Food
Student Was Referred to Student Counseling	Health
Met with Res Life Staff Issue Resolved	Housing
Student Met with Advisor and Referrals Made	Miscellaneous
Concern Was Addressed and Resolved	Miscellaneous