



## Case Management Referral Information

Updated October 28, 2021

Office/Service	When a referral should be made	What action will take place after the referral is made	When referral will be closed
Academic Advisor	<p>A referral to an Academic Advisor should be made when a staff person (e.g., instructor, RD) learns that a student is struggling academically; dealing with a personal issue that may interfere with academics or require coordination with instructor; or is not attending classes.</p> <p><b>This referral should be used for non-emergency situations only. If this is an emergency or requires an immediate response, please call the Pitt Police: 412-624-2121.</b></p> <p><b><i>The alert/case should only be used for students whose advisors are using the Pathways platform. This includes all students in Nursing, SCI, CGS, Engineering, and undeclared students at the regional campuses.</i></b></p>	<p>The response to the student will depend on the nature of the issue. If the Advisor is not already aware of the situation, they will gather information from the referring person (e.g., RD, financial aid counselor), check advising notes and midterm grades, and in rare cases, they may do information-gathering from instructors directly.</p> <p>If the advisor believes they need to meet with the student, they will reach to the student via email within two business days.</p>	<p>If the advisor believes there is no follow-up necessary, the case will be closed.</p> <p>If the advisor believes outreach is necessary, they will close the case after they have talked with the student or after three attempts to reach out to the student.</p>
Residence Life	<p>A referral to Residence Life should be made when a staff person (e.g., instructor, Academic Advisor) learns that a student is experiencing a residential issue; a social/campus connection issue; a personal issue; or is not attending classes.</p> <p><b>This referral should be used for non-emergency situations only. If this is an emergency or requires an immediate response, please call the Pitt Police: 412-624-2121.</b></p>	<p>The response to the student will depend on the nature of the issue. If the Residence Director is not already aware of the issue, they will gather additional information from the referring person (e.g., the advisor), ask a Resident Assistant to investigate the issue, and in rare cases, they may knock on the student's door. Depending on the situation, the Residence Director will work to address the situation directly or provide the student with resources.</p>	<p>If the Residence Director believes there is no follow-up necessary, the case will be closed.</p> <p>If the Residence Director believes outreach is necessary, they will close the case after they (or a Resident Assistant) has talked with the student or after three</p>



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	<p><b><i>This alert/case should be used for students who live in a residence hall on the Pittsburgh Campus only.</i></b></p>	<p>If the Residence Director believes outreach to student is necessary, they or a Resident Assistant will reach out to the student within two business days.</p>	<p>attempts to reach out to the student.</p>
<p>Global Experiences/Study Abroad</p>	<p>A referral to the Global Experiences Office should be made when a student expresses interest in studying abroad. The more information you are able to provide in the “additional comments” box, the more detailed the follow-up to that student will be.</p> <p><b><i>This alert/case can be used for students on the Pittsburgh &amp; Greensburg Campuses.</i></b></p>	<p>The Global Experiences Office will respond to the student with a personalized email. If detail is provided in the additional comments box, the email will refer the student to specific programs or contacts. If no detail is provided, the email will refer the student to general Global Experiences resources.</p> <p>The email will be sent within one week.</p>	<p>Although this referral will generate a case, these cases will not be managed and will be closed immediately.</p>
<p>Office of Financial Aid</p>	<p>A referral to the Financial Aid Office should be made when a staff member (e.g. instructor, Academic Advisor) learns the student has a financial issue that is impacting their academics and/or personal life.</p> <p><b><i>This alert/case should be used for students on the Pittsburgh Campus only.</i></b></p>	<p>The response to the student will be a personalized email from the Assistant Director of Client Services. A full review of the student’s file will be completed prior to contacting the student so that the message can be customized for the student’s needs.</p> <p>If the file review determines that the situation is best handled via a face-to-face appointment, then contact will be made through an email to the student giving available times. The initial contact will always be through an email but may require a meeting.</p>	<p>The case will be closed after three attempts were made to the student via email or after the student has met with a member of the financial aid team.</p>
<p>Honors College Referral</p>	<p>An Honors College referral should be made when a student expresses a general or</p>	<p>The Honors College will respond to the student with a personalized email. If detail is</p>	<p>Although this referral will generate a case, these cases</p>



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	<p>specific interest in Honors College opportunities (e.g., Honors courses, research programs, national scholarship competitions, the BPhil degree, applying to the Honors program) or when an advisor believes a student can benefit from engaging with the Honors College.</p> <p><b><i>This alert/case should be used for students on the Pittsburgh Campus unless the student is transferring from a regional campus.</i></b></p>	<p>provided in the additional comments box, the email will refer the student to specific opportunities. If no detail is provided, the email will refer the student to general opportunities.</p> <p>The email will be sent within one week.</p>	<p>will not be managed and will be closed immediately.</p>
Office of Veterans Services	<p>A referral to the Office of Veterans Services should be made when a staff person (e.g., instructor, advisor) learns that a military affiliated student is struggling academically; dealing with a personal issue that may interfere with academics or require coordination with instructor; or is not attending classes.</p> <p><b><i>This alert/case should only be used for students on the Pittsburgh Campus who are in a category that denotes Veteran status or military affiliation.</i></b></p>	<p>The response to the student will depend on the nature of the issue. If a coordinator in the Office of Veterans Services is not already aware of the situation, they will gather information from the referring person (e.g., advisor, financial aid counselor), check notes, and they may do information gathering from instructors/advisors directly.</p> <p>If the coordinator believes that they need to meet with the student in person or via phone, they will reach to the student via email within two business days.</p>	<p>If the advisor believes there is no follow-up necessary, the case will be closed.</p> <p>If the advisor believes outreach is necessary, they will close the case after they have talked with the student or after three attempts to reach out to the student.</p>
PIC Health Careers Referral	<p>A referral to a Pre-health Professions Advisor at the Pitt Interprofessional Center for Health Careers (PIC – Health Careers) should be made when a staff person (e.g., instructor, academic advisor, RD) learns that a student is considering a health-related career, deciding</p>	<p>PIC Health Careers staff will respond to the student with a personalized email, referring the student to specific programs offered by PIC Health Careers, and, if the student is a sophomore, junior, or senior, offering the</p>	<p>For freshmen, the case will be closed after the email is sent.</p> <p>For sophomores, juniors, and seniors, the case will be</p>



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	<p>among health-related careers, considering graduate health professions programs, or preparing an application to a graduate health professions program.</p> <p><b><i>This alert/case should only be used for students on the Pittsburgh Campus unless the student is transferring from a regional campus.</i></b></p>	<p>opportunity to schedule an appointment with a Pre-health Professions Advisor.</p> <p>The email will be sent within 5 working days.</p>	<p>closed after three attempts are made to reach the student via email or after the student has met with a Pre-health Professions Advisor.</p>
Office of International Services Referral	<p>A general referral to the Office of International Services could be made for international students in the following instances:</p> <ul style="list-style-type: none"> <li>- Interest in an internship/field placement/practicum, etc., OFF CAMPUS</li> <li>- Withdrawal from class after Add/Drop period</li> <li>- Leave of Absence</li> <li>- Transfer to a different institution</li> <li>- Post-Graduation Plans (employment, grad school, etc.)</li> </ul>	<p>The student will receive an automated email with information about how to best get in touch with OIS (e.g., appointment information).</p>	<p>No case opened.</p>
Study Lab Referral	<p>A referral to Study Lab should be made when a staff or faculty person (e.g., Academic Advisor, instructor) learns that a student is struggling academically or expresses interest in improving their grades or study habits.</p> <p><b><i>This alert/case should be used for students on the Pittsburgh campus only.</i></b></p>	<p>An Academic Coach will respond to the student with a personalized email. If detail is provided in the additional comments box, the email will refer the student to the specific service offered by Study Lab that may be most appropriate for them. If no detail is provided, the email will refer the student to all Study Lab services offered and invite them to schedule an individual coaching</p>	<p>The case will be closed after two attempts are made to contact the student via email or after the student has met with a member of Study Lab.</p>



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		<p>appointment to discuss relevant resources for their academic success. The email will be sent within two business days.</p>	
<p>Career Center Referral (PGH Campus)</p>	<p>A referral to the Career Center should be made when a staff person (e.g., instructor, academic advisor, RD) learns that a student needs assistance exploring careers or majors, deciding among several career interest areas, or can benefit from any career support such as internship or job search assistance or graduate school preparation.</p> <p>The more information you are able to provide in the “additional comments” box, the more detailed the follow-up to that student will be.</p> <p><b><i>This alert/case should only be used for students on the Pittsburgh Campus unless the student is transferring from a regional campus.</i></b></p> <p><b><i>Students in the College of Business Administration or students considering a health-related career should be referred to their respective Career Centers.</i></b></p>	<p>The response to the student will depend on the nature of the issue. All referred students will receive an automated email with information about how to schedule an appointment with a career consultant and utilize the resources of the Career Center. If the Career Center believes additional outreach to a student is necessary, a staff member will follow up with a personalized email within 5 business days.</p>	<p>If the Career Center believes there is no follow-up necessary, the case will be closed.</p> <p>If the Career Center believes outreach is necessary, they will close the case after they have talked with the student or after three attempts to reach out to the student.</p>
<p>University Center for International Studies Referral</p>	<p>A referral to the University Center for International Studies (UCIS) should be made when a student expresses interest in international studies credentials; resources and scholarships that support</p>	<p>UCIS will respond to the student with a personalized email. If detail is provided in the additional comments box, the email will likely refer them to an academic advisor in a particular UCIS center</p>	<p>The case will be closed when referrals have been made, or when it is determined that no follow up is necessary.</p>



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	<p>research and study abroad; and the events, professional development opportunities, and social activities for students interested in a particular world region or global theme.</p> <p><b><i>This alert/case should be used for students on the Pittsburgh Campus unless the student is transferring from a regional campus.</i></b></p>	<p>(African Studies, Asian Studies, etc.). If no detail is provided, the email will refer the student to general UCIS resources and a list of advisors in each program. The email will be sent within one week.</p>	
<p>Career Center Referral (UPG Campus)</p>	<p>A referral to Career Services should be made when a staff person (or faculty, if applicable) learns that a student needs or would like assistance exploring careers or majors, deciding among several career interests, or could benefit in regard to some kind of career support (e.g., gaining experience in his/her major, internship/job search assistance, graduate school preparation). The more information you are able to provide in the “additional comments” box, the more detailed the follow-up to that student will be.</p> <p><b><i>This alert/case should be used for students on the Greensburg Campus unless the student is transferring from another campus.</i></b></p>	<p>Following a referral, the response to the student will depend on the nature of the issue discussed. All referred students will receive an email from a staff member with information about how to schedule an appointment with a career consultant, the topics typically discussed, and how to utilize the resources of Career Services. If Career Services believes additional outreach to a student is necessary, a staff member will follow up for scheduling purposes.</p>	<p>Following the initial outreach to the student, the response or lack of response will determine the next steps in addition to the issue to address. If Career Services believes outreach is necessary, they will close the case after they have talked with the student or after three attempts to reach out to the student have been made. If the staff of Career Services believes follow-up is not necessary (e.g., have been actively meeting with the student), the case will be closed.</p>