How to Manage a Referral

1. When a referral that has been associated with has been made, an email will be sent to you.

2. There are two ways to “manage” a case to which you’ve been assigned:
   a. Via the student’s history tab:

   ![Jessica Lynn's History](image)

   b. Or via the case tab on the left-hand side of the screen
3. Using your unit's more detailed document on recommended actions and follow-up, you can add a comment, assign a new advisor to the case, or close a case.

4. Current case outcomes are below.
   a. Student Registered for Classes
   b. Student Not Registered After Attempts
   c. Unable to Track Down Student
   d. Student Responded to Academic Advisor
   e. Student Received Support