

## How to Manage a Referral

1. 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.



### A Case has been Assigned to You

<b>Student</b>
Student Name
<b>Referral Reasons</b>
Academic Referral (Pittsburgh Campus)
<b>Referral Issued By</b>
Michael Brubaker

[View Case Details](#)

You can also copy and paste this address into your web browser  
[https://pathways.campus.eab.com/cases?case=133160-academic\\_referral\\_pittsburgh\\_campus](https://pathways.campus.eab.com/cases?case=133160-academic_referral_pittsburgh_campus)

Questions? Please email [PathwaysHelp@pitt.edu](mailto:PathwaysHelp@pitt.edu).



2. There are two places you can access cases you have been assigned to so that you can 'manage' them.
  - a. Via the student's History Tab


The screenshot shows a user interface for managing cases. At the top, there is a filter dropdown menu labeled 'Filter Activity Types' with the text 'Select one or more activity types'. Below this, the date 'Sep 2023' is displayed. The main content area contains two entries. The first entry is titled 'Referral Issued' and is attributed to Michael Brubaker. It includes a date of 'Fri, Sep 8, 2023' and the category 'Academic Referral (Pittsburgh Campus)'. Below this, there is a section for 'Issuing Evaluation' with a paragraph of text explaining that the initial comment is from the issuer and that other comments are visible only to those assigned to the case. The second entry is titled 'Case Opened', also attributed to Michael Brubaker, with the same date and category. It includes the text 'Assigned to: Maggie Dykstra'. At the bottom of this entry, there is a blue link labeled 'Manage Case' with a yellow arrow pointing to it. The interface ends with 'End' at the bottom.

- b. Or via the case tab on the left-hand side of the screen



- Depending on your individual unit's recommended actions and follow-up, you can add a comment, assign additional advisors to the case, or a close a case.

**MANAGE CASE**
✕



**Student Name**  
Reason: Academic Referral (Pittsburgh Campus)

Owner  
Select an owner

Assignees  
 Maggie Dykstra
  Brian Williams

**Case Activity:**

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09/08/2023

- ↗ [Instructor Name] assigned case to Maggie Dykstra. 02:37PM
- 📁 [Instructor Name] opened case. 02:37PM
- 💬 [Instructor Name] added comment: 02:37PM  
The initial comment that is made by the person who issued the referral will appear here. The Case (and any comments left on the Case) are only visible to those individuals who are Assigned to the Case. University administrators and department leaders may also have access to see comments on a Case.
- ↗ Maggie Dykstra assigned case to Brian Williams. 03:47PM

Add Comment

cancel

Close Case

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

When you Close the Case you have to choose one of the Case Closed Outcomes. At the moment that you close the case, an automated email is sent to the person who issued the referral, and this Case Closed Outcome is included in the email. When appropriate to do so, if you check the box to “Allow closed comments to be shown in an email,” then the comments you write in this final step will also be included in the automated email, and only these comments will be visible to the referral issuer.

Outcome:

Comment:

Allow closed comments to be shown in an email

Choose

Choose

No Follow-Up Necessary

Student Did Not Respond to Outreach

Student Received Support

Student Was Emailed

Administrative Case Closure

Referred to Other Office