

Advisor How-To on Cases

In the fall of 2019 Academic Programs and Services (APS), after listening to the concerns of faculty wanting to include students outside of the midterm progress report campaign, opened the ability for faculty and staff to issue an academic alert through Bay Advisor. We did a small roll out in fall 2019, and have now opened up the process campus wide, to all faculty and staff. If you have issues or questions with the process, please contact Bill Irwin at bill.irwin@csueastbay.edu

As advisors, if a Case is assigned to you, you will receive an email notification. To access your cases, click on the case icon from your menu in Bay Advisor.



Here you will be directed to all the open cases that have been assigned to you. Cases are assigned to you because you are the advisor of record. There could be multiple advisors assigned to a case, if so, please work with each other for the betterment of the student and together resolve the case.

Cases for Students Enrolled in Selected Term



Status: Open

Care Unit: All Student: Anyone Opened By: Anyone Assigned To: Anyone Alert Reasons: Any Reason Date Opened: to

Search

STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER
Mandy Daniel	Open		Other (Please insert comments) Case	04/01/2020	Bridget Ford	04/02/2020	Meena Sharma	Natalia Musgrove	Manage Case
Miles Hansen/Judd	Open		Excessive Lateness/Absences Case	04/01/2020	Zaneen McClain	04/01/2020	Meena Sharma	Angela Byrns	Manage Case

This can be filtered by the drop-down menu above if necessary. You can also see any closed cases by switching the status to closed.

Manage Case

To manage or update a case, click on the Manage Case button. This will open up a new window and allow you to add notes to the case.

MANAGE CASE

Gabriel Glasco
Reason: Suggested to Withdraw from course (Case)
Class: HIST-101-03-LEC World History I

Owner: Select an owner

Assignees: Natalia Musgrove

Discard Save Changes

Case Activity:

04/01/2020

- Benjamin Klein opened case. 10:50AM
- Benjamin Klein added comment: 10:50AM
- Meena Sharma assigned case to Natalia Musgrove. 03:29PM
- Natalia Musgrove added comment: Called student, no answer and no option to leave a VM. Sent a text message. 04:00PM

Add Comment

cancel Close Case

MANAGE CASE ✕

Student: Gabriel Glasco

Reason(s): Suggested to Withdraw from course (Case)

Outcome: Choose

Comment:

Outreach Provided

Case Closed - Student contacted 3X, no response

Student took recommended action

Student Advised to Speak with Faculty

Student Receiving Ongoing Support

Referred to Campus Resource(s) (Please Include in Comments)

Case Closed - Other (Please Include Comments)

[Go Back](#)

[Submit](#)

Once the case has been worked and the student has been recommended an action to take, or you were unable to contact the student, please close the case by clicking on Close Case. This will open another window where you can select the reason. Before clicking CLOSE, please select the button to **“Allow closed comments to be shown in Email”** as this will send your comments back to the issuer of the case to help close the communication loop.

Once the case is closed, an automated email will be sent to the professor who issued the alert with the outcome reason. If you do not select the button mentioned above, the notes along the way will not be included in the email. The email the professor receives is below look like:



Case Closed

Student
Ashley Bline

Alert Reasons
Poor Performance on Test/Quizzes Case

Alert Issued on
April 2

Case Outcome
Outreach Provided

Closed by
Bill Irwin

Closed on Date
April 2