How an advisor refers students to UHCL resources/care units (ex, Writing Center, Math Center, & Student Success Center).

Steps 2-3 provide instruction on how to submit a referral. Steps 4-5 provide instructions on how to view and manage submitted referrals (detailed instructions on How to manage cases work-aid).

### Steps | Descriptions
--- | ---
2. | **Click:** Issues an Alert  
**Dialogue box will pop-up. See step 3.**
3. | Enter required information  
- **Student Name**  
- **Reason for referral**  
- **Class (optional)**  
- **Additional Comments** (It is essential to provide a brief explanation of the student's situation and needs.)

**Click:** Submit

**DONE**

How to refer student instructions end here. Next pages explain how to view and manage referrals.

Updated 06/10/2020
4. To view cases (referrals):
   Click: **Cases (folder looking icon)** Then see step 5

   ![Staff Home screenshot]

   Staff Home
   - My Assigned Students for Summer 2020
   - Action
   - Quick Links
   - Actions
   - Note on Bas

5. **From this page, you can manage your cases (referrals).** Cases can be pulled by status, care unity, student, etc. NOTE: When you make a referral, EAB opens a case, which is how the referral is tracked and closed.

   ![Cases for Students Enrolled in Selected Term]

   Cases for Students Enrolled in Selected Term
   - Status: Open
   - Care Unit
   - Student: Anyone
   - Opened By: Anyone
   - Assigned To: Anyone
   - Alert Reasons: Any Reason
   - Date Opened
   - Search

   ![Case details]

   - **DONE**
   - **NOTE:** Student will receive an email indicating they are beginning referred to a UHCL service.