

# Another Academic Early Alert Training (Maxient)

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May 2019 Advisor Forum

# What's new for Faculty?

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- Streamlined Process: No longer required to log into an Academic Referral system to submit early alerts
- Transparency: Now have the option to be copied along the Academic Referral process
- Accountability: Now required to provide dates and more details in submissions

# New Location for Faculty to Submit Academic Referrals

nsuok.edu (bottom)



Report Concern



“Academic Referral / Early Alert” button

The screenshot shows the footer of the Northeastern State University website. At the top of the footer are logos for REACH HIGHER, YELLOW RIBBON, PROUD MEMBER OF RUSO, and TREE CAMPUS USA. Below these are three columns of navigation links: FUTURE STUDENTS (Get Started, About Us, Admissions, Campus Tour, FAQs, Financial Aid, Student Consumer Information), CURRENT STUDENTS (Academic Advising, Blackboard, Career Services, Degree Works, Enrollment, Housing, Student Affairs), and ACADEMICS (Bookstore, Colleges, Continuing Education, Course Catalog, Course Schedules, Degrees & Majors, Library). To the right is the university name and social media icons. A central accreditation badge for the Higher Learning Commission is visible. At the bottom, a navigation bar contains links for Contact Us, Jobs at NSU, Book Event, Administration, Campus Police, Emergency Operations, Title IX, LC, and Report Concern. The 'Report Concern' link is circled in red, and several red arrows point towards it from various directions.

[https://cm.maxient.com/reportingform.php?NortheasternStateUnivOK&layout\\_id=7](https://cm.maxient.com/reportingform.php?NortheasternStateUnivOK&layout_id=7)

# Academic Referral / Early Alert Form

Pt. 1

## Reporter Information

Your Full Name (Required):

Your Position/Title:

Your NSU Email (Required):

Nature of this report (Required):

Date of last class attended (Required):



Campus Location (Required):

# Academic Referral / Early Alert Form

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Pt. 2

## Student of Concern

Name of Student

ID Number (N\*\*\*\*\*)

NSU Email address

# Academic Referral / Early Alert Form

Pt. 3

## Description

Please select the Attendance and/or Academic reason(s) for concern. (Required)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Never attended class | <input type="checkbox"/> Late/incomplete assignments                            | <input type="checkbox"/> Poor study habits                                       |
| <input type="checkbox"/> Excessive absences   | <input type="checkbox"/> Poor performance on exams or assignments               | <input type="checkbox"/> Poor test-taking abilities                              |
| <input type="checkbox"/> Excessive tardiness  | <input type="checkbox"/> Lacking basic skills/prerequisite knowledge for course | <input type="checkbox"/> Does not participate in class activities or discussions |

Have you discussed your concern with the student? (Required)

- Yes
- No
- Unable to contact student

If yes, please describe the contact and any agreed upon next steps. If no, please explain why you chose not to discuss the concern with the student. If unable to contact the student, please describe the issue in detail and any attempts made to contact student (Date & Method of Contact). (Required)

Is it possible for the student to pass this course this semester? (Required)

- Yes
- No

What is the CRN for this course? (Required)

# After Faculty Submit Referral...

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- Academic referral received and reviewed by Student Success Coordinator

# During Referral Review...

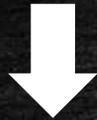
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- Students are notified via TEXT message that they have been emailed an important letter from NSU
- Students are notified via EMAIL that an official letter has been issued to them by Academic Advising
- Students are sent an official LETTER, outlining academic concern(s) and directed to discuss concern(s) with their instructor in a timely manner
  - Letter names Faculty that submitted Academic Referral
  - Letter names Advisor and directs them to Advisor for additional assistance

# After Faculty submit referral...

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- Academic referral received and reviewed by Student Success Coordinator
- **SSC then attempts to contact student within 2 business days of receiving referral, if unable to make contact referral is then reassigned to student's Academic Advisor**



- **Advisor then attempts to contact student within 2 business days of receiving referral**

# What's new for Advisors?

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- Nothing
- Just kidding
- But don't worry, it's not a lot!
- Basically it is the same thing, just using a different program
- 1. Reach out to the student of concern
- 2. Document contact
- 3. Update referral status

# Step #1: Log into Maxient

- [cm.maxient.com/nsuok](https://cm.maxient.com/nsuok) (same login as goNSU)

**NSU Login**



Username:

Password:

**LOGIN**

[? Forgot your password?](#)

For security reasons, please [log out](#) and exit your web browser when you are done accessing services that require authentication!

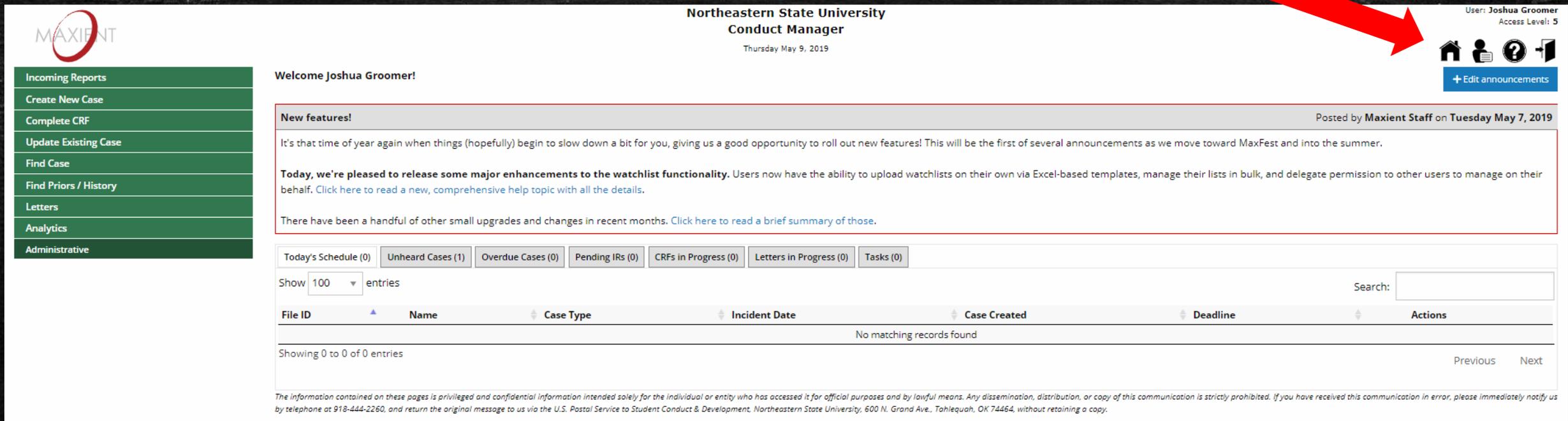
**maxient**  
NSU | Maxient 

**Help?**

- [Make a payment](#)
- [Unable to login? Try clearing your cache.](#)
- [Contact the IT Service Desk at 918-444-5678 or email \[help@nsuok.edu\]\(mailto:help@nsuok.edu\)](#)

# Maxient Home Screen / Dashboard

- If lost, click the Home button (top right) to return



**MAXIENT**

Northeastern State University  
Conduct Manager  
Thursday May 9, 2019

User: Joshua Groomer  
Access Level: 5

Welcome Joshua Groomer!

[Home](#) [User](#) [Help](#) [Logout](#)  
[+ Edit announcements](#)

**New features!** Posted by Maxient Staff on Tuesday May 7, 2019

It's that time of year again when things (hopefully) begin to slow down a bit for you, giving us a good opportunity to roll out new features! This will be the first of several announcements as we move toward MaxFest and into the summer.

**Today, we're pleased to release some major enhancements to the watchlist functionality.** Users now have the ability to upload watchlists on their own via Excel-based templates, manage their lists in bulk, and delegate permission to other users to manage on their behalf. [Click here to read a new, comprehensive help topic with all the details.](#)

There have been a handful of other small upgrades and changes in recent months. [Click here to read a brief summary of those.](#)

Today's Schedule (0) Unheard Cases (1) Overdue Cases (0) Pending IRs (0) CRFs in Progress (0) Letters in Progress (0) Tasks (0)

Show 100 entries Search:

| File ID                   | Name | Case Type | Incident Date | Case Created | Deadline | Actions |
|---------------------------|------|-----------|---------------|--------------|----------|---------|
| No matching records found |      |           |               |              |          |         |

Showing 0 to 0 of 0 entries Previous Next

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# Step #2: View Unheard Cases (Referrals)

- Click on Unheard Cases tab to view assigned referrals

**MAXIENT** Northeastern State University  
Conduct Manager  
Thursday May 9, 2019

User: Joshua Groomer  
Access Level: 5

Welcome Joshua Groomer!

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There have been a handful of other small upgrades and changes in recent months. [Click here to read a brief summary of those.](#)

Today's Schedule ( **Unheard Cases (1)** | Overdue Cases (0) | Pending IRs (0) | CRFs in Progress (0) | Letters in Progress (0) | Tasks (0) )

Show 100 entries Search:

| File ID    | Name           | Case Type         | Status | Incident Date | Case Created | Deadline   | Actions |
|------------|----------------|-------------------|--------|---------------|--------------|------------|---------|
| 2018092501 | Luke Skywalker | Academic Advising | Open   | 2019-05-09    | 2019-05-09   | 2019-05-23 | Actions |

Showing 1 to 1 of 1 entries Previous 1 Next

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# Step #3: View Referral

- Click on File ID # to view referral

**MAXIENT** Northeastern State University  
Conduct Manager  
Thursday May 9, 2019

User: Joshua Groomer  
Access Level: 5

Welcome Joshua Groomer!

**New features!** Posted by Maxient Staff on Tuesday May 7, 2019

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Today's Schedule (0) Unheard Cases (1) Overdue Cases (0) Pending IRs (0) CRFs in Progress (0) Letters in Progress (0) Tasks (0)

Show 100 entries Search:

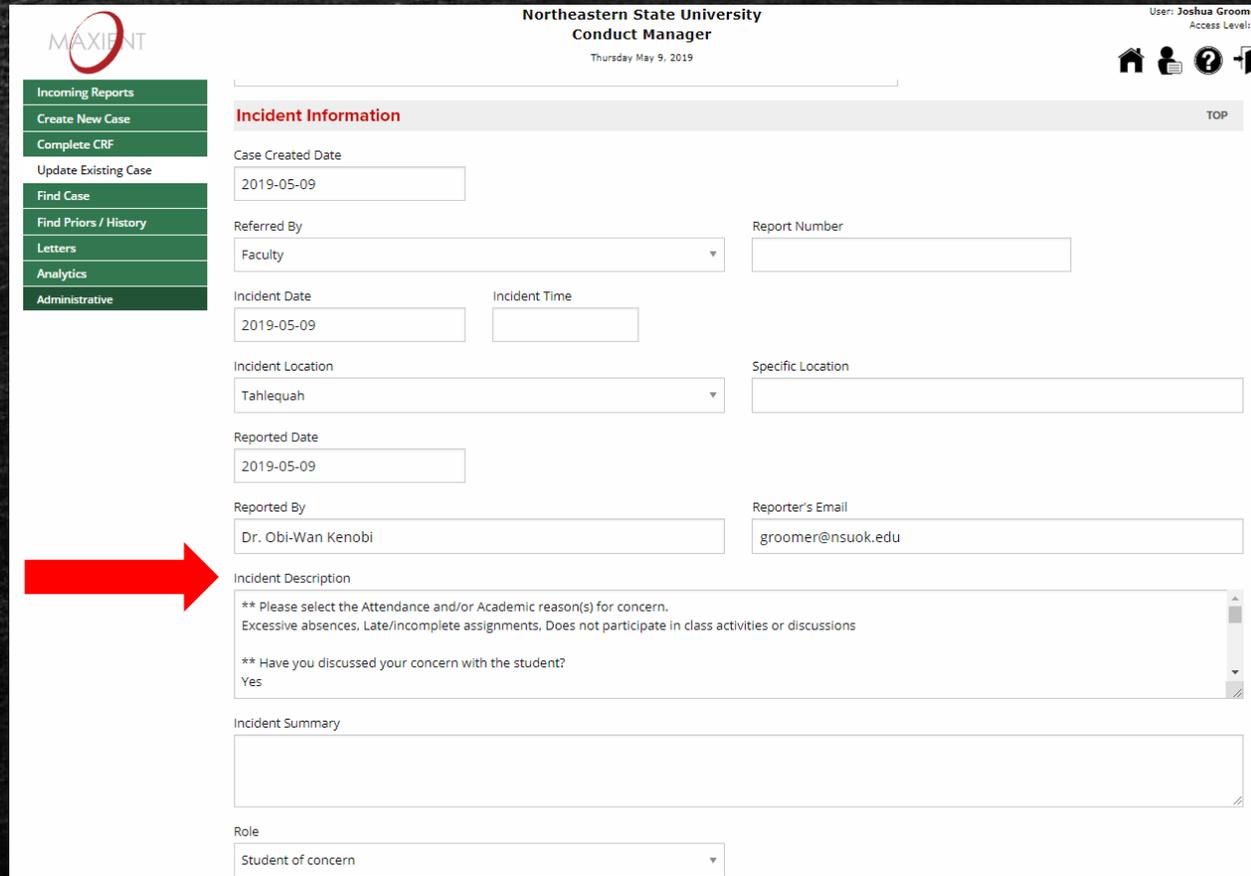
| File ID    | Name           | Case Type         | Status | Incident Date | Case Created | Deadline   | Actions |
|------------|----------------|-------------------|--------|---------------|--------------|------------|---------|
| 2018092501 | Luke Skywalker | Academic Advising | Open   | 2019-05-09    | 2019-05-09   | 2019-05-23 | Actions |

Showing 1 of 1 entries Previous 1 Next

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# Step #4: Review Incident Information

- Stop to view the Incident Information (referral description)



**MAXIPOINT** **Northeastern State University** **Conduct Manager** Thursday May 9, 2019 User: Joshua Groomer Access Level: 5

**Incident Information** TOP

Case Created Date: 2019-05-09

Referred By: Faculty

Incident Date: 2019-05-09 Incident Time:

Incident Location: Tahlequah

Reported Date: 2019-05-09

Reported By: Dr. Obi-Wan Kenobi

**Incident Description**

\*\* Please select the Attendance and/or Academic reason(s) for concern.  
Excessive absences, Late/incomplete assignments, Does not participate in class activities or discussions

\*\* Have you discussed your concern with the student?  
Yes

Incident Summary

Role: Student of concern

# EFC tab = Electronic File Cabinet

- You can also view an electronic copy of the referral in Electronic File Cabinet by clicking on the document icons

**MAXIENT** User: Joshua Groomer  
Access Level: 5

**Northeastern State University  
Conduct Manager**  
Thursday May 9, 2019

Clery Rationale

**Electronic File Cabinet** TOP

These files are attached to everyone in the case

| File  | File name       | Size   | Date added          | Delete?   |
|---|-----------------|--------|---------------------|---|
|  | INCIDENT REPORT | 2.46kb | May 9, 2019 8:56 pm | <input type="checkbox"/> Delete the IR from all parties |

Attach more files to entire case  No file chosen

These files are attached only to Luke Skywalker

| File  | File name           | Size   | Date added          | Delete?                              |
|---|---------------------|--------|---------------------|--------------------------------------|
|  | Case Creation Sheet | 9.71kb | May 9, 2019 8:56 pm | <input type="checkbox"/> Delete file |

Attach more files to this individual  No file chosen

# Step #5: Proceed to Notes section

- Click on "Notes" tab

The screenshot displays the 'Update Existing Case' interface in the 'Conduct Manager' system. The page title is 'Northeastern State University Conduct Manager' with the date 'Friday July 19, 2019'. The user is identified as 'Joshua Groomer' with an 'Access Level: 5'. The case ID is '2018096101 Luke Skywalker (22222222)'. A navigation menu at the top includes 'CASE', 'DEMOGRAPHICS', 'CONTACT', 'INCIDENT', 'EFC', 'ASSIGNMENT', 'RESOLUTION', 'ACTIONS', 'TASKS', 'NOTES', and 'OTHER'. The 'NOTES' tab is highlighted with a red circle. Below the navigation, there are tabs for 'Individual Notes (1)' and 'General Notes / File History (0 words)'. A blue button prompts to 'Add a new note by clicking here'. A note is displayed with the text 'Attempted to contact student via telephone, no response.' and a 'Delete note' checkbox. A 'Save updates (saves all tabs above)' button is at the bottom, along with an 'Export / Reset' button. A footer contains a disclaimer: 'The information contained on these pages is privileged and confidential information intended solely for the individual or entity who has accessed it for official purposes and by lawful means. Any dissemination, distribution, or copy of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone at 918-444-2260, and return the original message to us via the U.S. Postal Service to Student Conduct & Development, Northeastern State University, 600 N. Grand Ave., Tahlequah, OK 74464, without retaining a copy.'

# Step #6: Add Notes

- Click on "Add a new note by clicking here" button

The screenshot displays the 'Notes' section of the 'Northeastern State University Conduct Manager' application. The user is identified as Joshua Groomer with an Access Level of 5. The date is Thursday, May 9, 2019. The interface includes a sidebar with navigation options: Incoming Reports, Create New Case, Complete CRF, Update Existing Case, Find Case, Find Priors / History, Letters, Analytics, and Administration. The 'Add a new note by clicking here' button is highlighted with a red circle. Below this button, there is a checkbox for 'Attach this note to all parties in the case' and a dropdown menu for 'Note Category' set to 'Advising Update'. The 'Note Subject' field contains 'Enter Subject'. The 'Note Content' field contains the text: 'Called student at number listed, no answer. Emailed student, directing them to contact instructor and set an appointment to discuss concerns and review degree progress.' The 'Date' field is empty, and the 'Hour', 'Minute', and 'am/pm' fields are dropdown menus. A red arrow points to the 'Administration' menu item, another red arrow points to the 'Note Content' field, and a third red arrow points to the 'Date' field. A note at the bottom states: 'Leave blank to use the current date and time' and 'To save this note, you must commit changes at the bottom of the page.'

# Step #7: Save Notes

- To save the notes, scroll down and click on the "Save updates (saves all tabs above)" button

The screenshot displays the 'Northeastern State University Conduct Manager' interface. On the left is a navigation menu with options like 'Incoming Reports', 'Create New Case', and 'Find Case'. The main area contains a form for creating a new note. The form includes a checkbox to 'Attach this note to all parties in the case', a 'Note Category' dropdown menu (currently set to 'Advising Update'), a 'Note Subject' text field, and a 'Note Content' text area. Below these are fields for 'Date', 'Hour', 'Minute', and 'am/pm'. A message states: 'To save this note, you must "Save updates" at the bottom of the page.' Below the form is a list of existing notes. Each note entry includes a 'Click to edit' link, the user name and timestamp, the note content, and a 'Delete note' checkbox. The first note is titled 'ADVISING UPDATE' and the second is 'UNCATEGORIZED'. At the bottom center of the page, a blue button labeled 'Save updates (saves all tabs above)' is circled in red.

**Northeastern State University**  
Conduct Manager  
Friday July 19, 2019

User: Joshua Groomer  
Access Level: 5

Attach this note to all parties in the case

Note Category  
Advising Update

Note Subject  
Enter Subject

Note Content  
Enter Note

Date: [ ] Hour: [ ] Minute: [ ] am/pm: [ ]

Leave blank to use the current date and time

To save this note, you must "Save updates" at the bottom of the page.

**Click to edit**  Delete note  
Joshua Groomer - Friday July 19, 2019 at 2:55pm  
Unable to make contact, reassigning to SSC  
ADVISING UPDATE

**Click to edit**  Delete note  
Joshua Groomer - Friday July 19, 2019 at 2:44pm  
Attempted to contact student via telephone, no response.  
UNCATEGORIZED

**Save updates (saves all tabs above)**

Once ready to close referral,  
proceed to Step #8

---

If unable to make contact with  
student, proceed to Step #12

# Step #8: Closing Referrals

- After saving Notes, click on Complete CRF link

**MAXIENT**

**Northeastern State University**  
**Conduct Manager**

Thursday May 9, 2019

User: **Joshua Groomer**  
Access Level: 5

Database record for 2018092501 updated successfully.

Quick links for this file: [Complete CRF](#) | [Find Priors](#) | [Letters](#) | [Update Existing Case](#) | [Generate printable record](#)

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**Incoming Reports**

**Create New Case**

**Complete CRF**

**Update Existing Case**

**Find Case**

**Find Priors / History**

**Letters**

**Analytics**

**Administrative**

# Step #9: Case Resolution Form (CRF)

- Enter Resolution Information required fields

The screenshot displays the 'Northeastern State University Conduct Manager' interface. The page title is 'Northeastern State University Conduct Manager' with the date 'Thursday May 9, 2019'. The user is identified as 'User: Joshua Groomer' with 'Access Level: 5'. The interface includes a navigation menu on the left with options: 'Incoming Reports', 'Create New Case', 'Complete CRF', 'Update Existing Case', 'Find Case', 'Find Priors / Hi', 'Letters', 'Analytics', and 'Administrative'. The main content area is titled 'I. Resolution Information' and contains several required fields: 'Resolution Type (Required)', 'Resolution Date (Required)', 'Administrator 1 (Required)', 'Administrator 2', 'Administrator 3', 'Clery Reportability', and 'Clery Rationale'. Red arrows point to the 'Complete CRF' button in the navigation menu and the 'Resolution Date (Required)' field.

**MAXIENT**

Northeastern State University  
Conduct Manager  
Thursday May 9, 2019

User: Joshua Groomer  
Access Level: 5

Home User Profile Help Electronic File Cabinet

**I. Resolution Information**

Resolution Type (Required) [Dropdown] Resolution Date (Required) [Text]

Administrator 1 (Required) [Dropdown]

Administrator 2 [Dropdown]

Administrator 3 [Dropdown]

Clery Reportability [Text]

Clery Rationale [Text]

# Step #9: Review Case Resolution Form (CRF)

- After entering Resolution Information, scroll down and click on "Review this CRF" button

The screenshot displays the user interface for the Northeastern State University Conduct Manager. At the top left is the MAXIENT logo. The main header includes the text "Northeastern State University Conduct Manager" and the date "Thursday May 9, 2019". On the top right, the user's name "User: Joshua Groomer" and "Access Level: 5" are shown, along with navigation icons for home, user profile, help, and a mobile device. A left-hand navigation menu contains several green buttons: "Incoming Reports", "Create New Case", "Complete CRF", "Update Existing Case", "Find Case", "Find Priors / History", "Letters", "Analytics", and "Administrative". In the main content area, there is a blue "Add another" button. Below it, the "Next Steps" section contains two unchecked checkboxes: "Show the CRF resolution options, if available, on the next screen" and "Show blocks for signatures on the next screen". A prominent blue button labeled "Review this CRF" is circled in red. At the bottom of the page, a small disclaimer states: "The information contained on these pages is privileged and confidential information intended solely for the individual or entity who has accessed it for official purposes and by lawful means. Any dissemination, distribution, or copy of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone at 918-444-2260, and return the original message to us via the U.S. Postal Service to Student Conduct & Development, Northeastern State University, 600 N. Grand Ave., Tahlequah, OK 74464, without retaining a copy."

# Step #9: Case Resolution Form (CRF)

- Enter Resolution Information required fields

**MAXIENT** User: Joshua Groomer  
Access Level: 5

**Northeastern State University  
Conduct Manager**  
Thursday May 9, 2019

[Electronic File Cabinet](#)

**I. Resolution Information**

Resolution Type (Required)  Resolution Date (Required)

Administrator 1 (Required)

Administrator 2

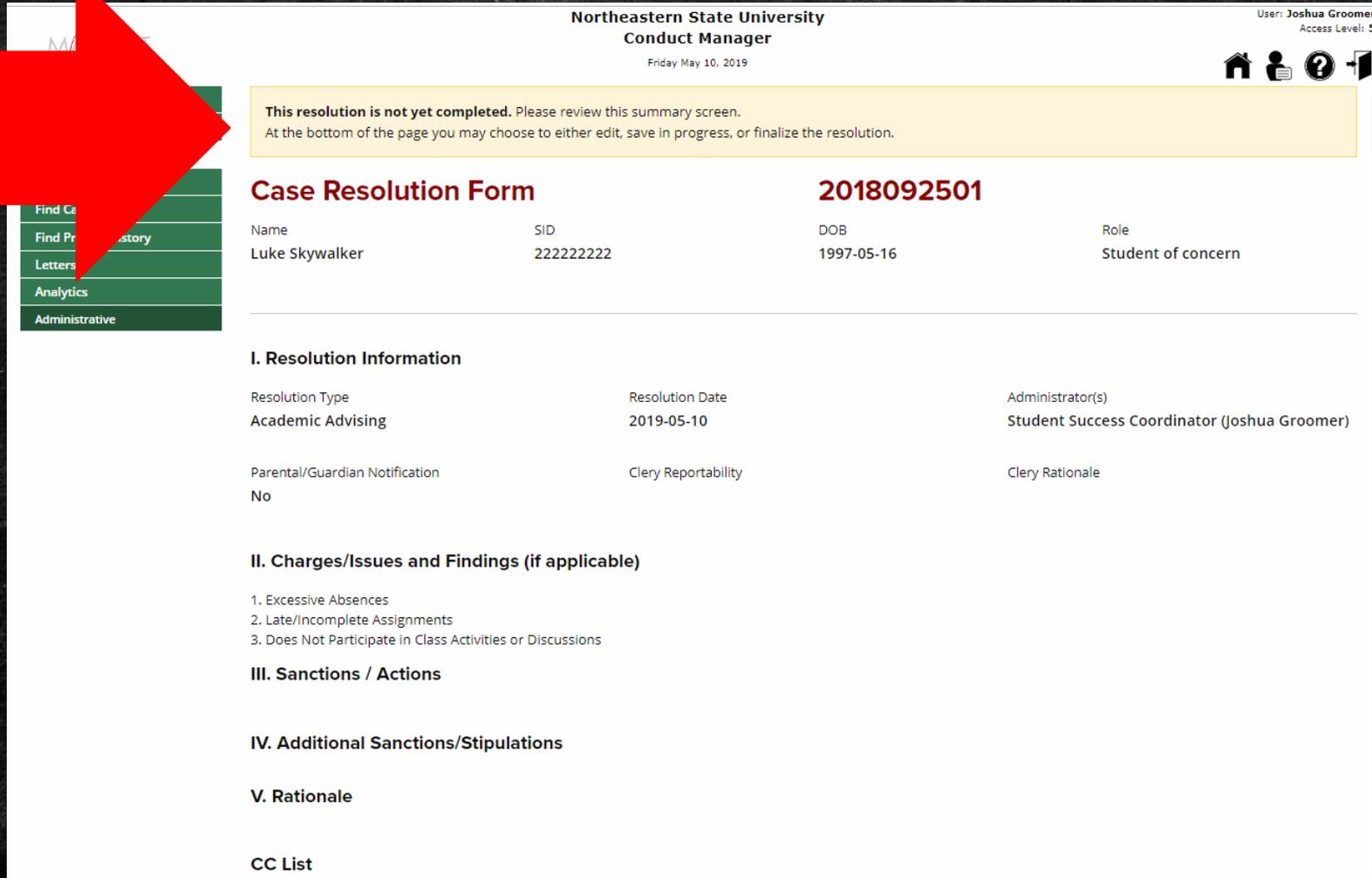
Administrator 3

Clery Reportability

Clery Rationale

**Left Sidebar:** Incoming Reports, Create New Case, Complete CRF, Update Existing Case, Find Case, Find Priors / history, Letters, Analytics, Administrative

# Notice that the CRF is not yet complete!



**Northeastern State University**  
**Conduct Manager**  
Friday May 10, 2019

User: Joshua Groomer  
Access Level: 5

Home User Help ?

**This resolution is not yet completed.** Please review this summary screen.  
At the bottom of the page you may choose to either edit, save in progress, or finalize the resolution.

**Case Resolution Form** **2018092501**

|                |          |            |                    |
|----------------|----------|------------|--------------------|
| Name           | SID      | DOB        | Role               |
| Luke Skywalker | 22222222 | 1997-05-16 | Student of concern |

**I. Resolution Information**

|                                |                     |  |
|--------------------------------|---------------------|--|
| Resolution Type                | Resolution Date     | Administrator(s)                             |
| Academic Advising              | 2019-05-10          | Student Success Coordinator (Joshua Groomer) |
| Parental/Guardian Notification | Clery Reportability | Clery Rationale                              |
| No                             |                     |  |

**II. Charges/Issues and Findings (if applicable)**

- Excessive Absences
- Late/Incomplete Assignments
- Does Not Participate in Class Activities or Discussions

**III. Sanctions / Actions**

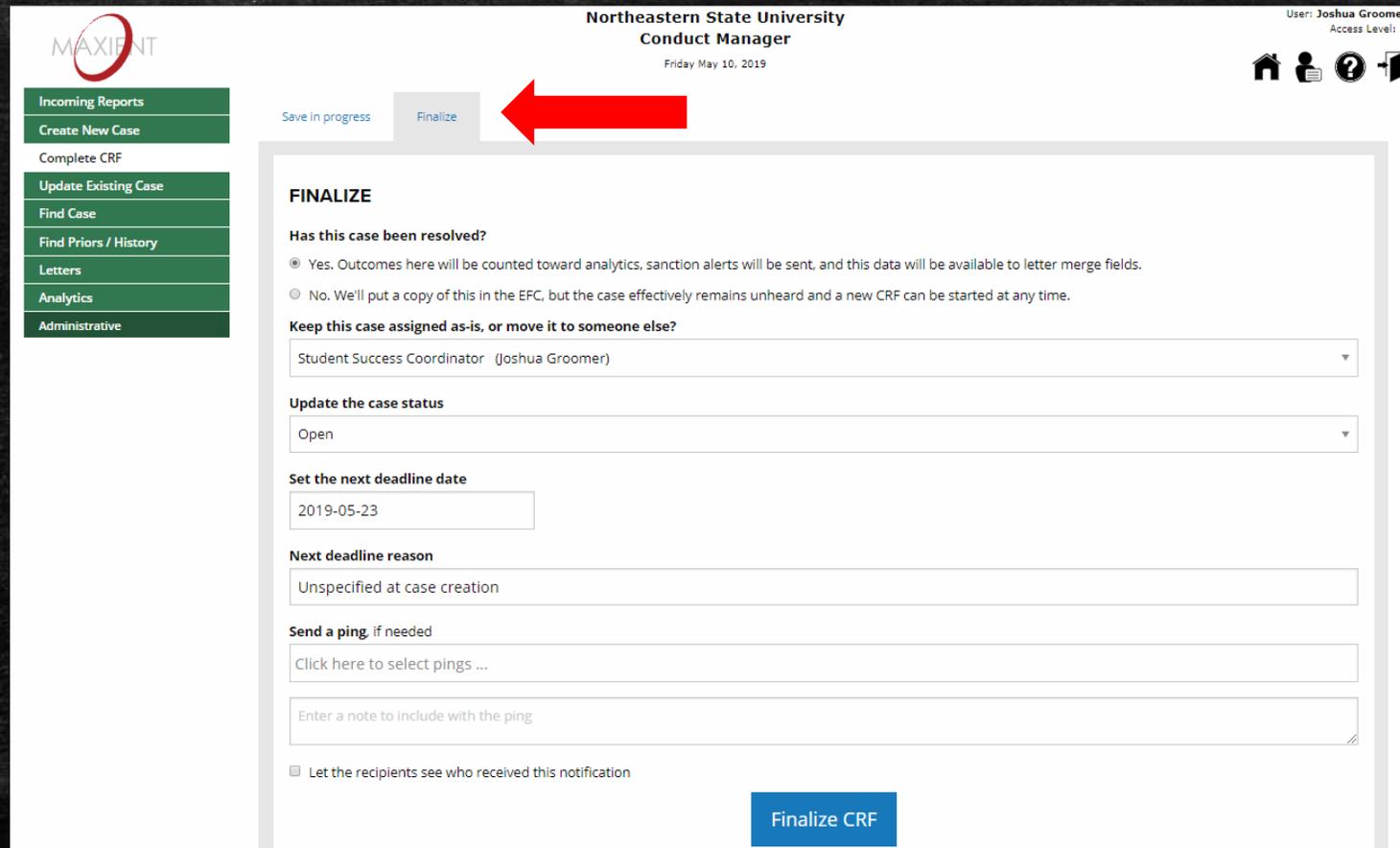
**IV. Additional Sanctions/Stipulations**

**V. Rationale**

**CC List**

# Step #10: Finalize Case Resolution Form (CRF)

- Scroll down & Click on the Finalize tab



The screenshot displays the MAXIPNT Conduct Manager interface. The header includes the MAXIPNT logo, the text "Northeastern State University Conduct Manager", the date "Friday May 10, 2019", and user information "User: Joshua Groomer Access Level: 5". A navigation menu on the left lists various options. The main content area shows the "FINALIZE" section with several form fields and a "Finalize CRF" button. A red arrow points to the "Finalize" tab.

**MAXIPNT** Northeastern State University  
Conduct Manager  
Friday May 10, 2019  
User: Joshua Groomer  
Access Level: 5

Incoming Reports  
Create New Case  
Complete CRF  
Update Existing Case  
Find Case  
Find Priors / History  
Letters  
Analytics  
Administrative

Save in progress Finalize

**FINALIZE**

**Has this case been resolved?**

- Yes. Outcomes here will be counted toward analytics, sanction alerts will be sent, and this data will be available to letter merge fields.
- No. We'll put a copy of this in the EFC, but the case effectively remains unheard and a new CRF can be started at any time.

**Keep this case assigned as-is, or move it to someone else?**

Student Success Coordinator (Joshua Groomer)

**Update the case status**

Open

**Set the next deadline date**

2019-05-23

**Next deadline reason**

Unspecified at case creation

**Send a ping, if needed**

Click here to select pings ...

Enter a note to include with the ping

Let the recipients see who received this notification

Finalize CRF

# Step #11: Update Case Status & Finalize CRF

- Select Closed & Click on the “Finalize CRF” button

**MAXIENT** Northeastern State University  
Conduct Manager  
Friday May 10, 2019  
User: Joshua Groomer  
Access Level: 5

**FINALIZE**

Has this case been resolved?

Yes. Outcomes here will be counted toward analytics, sanction alerts will be sent, and this data will be available to letter merge fields.

No. We'll put a copy of this in the EFC, but the case effectively remains unheard and a new CRF can be started at any time.

Keep this case assigned as-is, or move it to someone else?

Student Success Coordinator (Joshua Groomer)

Update the case status

Closed

Set the next deadline date

2019-05-23

Next deadline reason

Unspecified at case creation

Send a ping, if needed

Click here to select pings ...

Enter a note to include with the ping

Let the recipients see who received this notification

**Finalize CRF**

# Step #12: Reassign Case Back to SSC

- Click on the "Assignment" tab, select Student Success Coordinator under "Assigned To" section, "Save updates"

The screenshot displays the 'Update Existing Case' interface in the 'Conduct Manager' system. The 'Assignment' tab is selected and circled in red. The 'Assigned To' dropdown menu is set to 'Student Success Coordinator (Joshua Groomer)', with a red arrow pointing to it from the left sidebar. The 'Save updates (saves all tabs above)' button at the bottom is also circled in red. The sidebar on the left includes options like 'Incoming Reports', 'Create New Case', and 'Update Existing Case'. The top right shows the user 'Joshua Groomer' with an access level of 5 and the case ID '2018096101 Luke Skywalker (222222222)'. The date is Friday, July 19, 2019.

**MAXIENT** | Northeastern State University Conduct Manager | Friday July 19, 2019 | User: Joshua Groomer Access Level: 5

## Update Existing Case

Tour the new Update screen!

CASE | DEMOGRAPHICS | CONTACT | INCIDENT | EFC | **ASSIGNMENT** | RESOLUTION | ACTIONS | TASKS | NOTES | OTHER

Home Office  
Academic Advising

Assigned To  
Student Success Coordinator (Joshua Groomer)

Appointment Date | Appointment Time | Appointment Location

*Note: If scheduling a new appointment, be sure to update the next deadline date too.*

**Save updates (saves all tabs above)**