



# CardSmart Training

## Referrals in CardSmart

### When to refer to...

<b>Academic Advisors</b>	<ul style="list-style-type: none"> <li>• Course planning/registration matters/adjusting schedules</li> <li>• Withdrawing from courses</li> <li>• Full-time/part-time status or course loads</li> <li>• Academic petitions and policies (bankruptcy, repeating courses, etc.)</li> <li>• Unit specific questions</li> <li>• Academic performance concerns</li> <li>• Changing majors or adding minors</li> <li>• Questions regarding graduation/ degree progress</li> </ul>
<b>Metro College</b>	<ul style="list-style-type: none"> <li>• <b>MC Employment Issue</b> <ul style="list-style-type: none"> <li>○ Hours</li> <li>○ Leave of absence</li> <li>○ Work issues (want to quit UPS, issues with supervisors, etc.)</li> </ul> </li> <li>• <b>MC Billing question</b> <ul style="list-style-type: none"> <li>○ Students have questions on adding or dropping courses and how it will affect bill</li> <li>○ Fees</li> <li>○ Online Classes</li> <li>○ Not seeing MC on their bill (or an agreement on their MyMC page)</li> <li>○ Balances/financial holds</li> </ul> </li> <li>• <b>MC Benefit Question</b> <ul style="list-style-type: none"> <li>○ Eligibility</li> <li>○ Bonuses</li> <li>○ Work Commitment dates</li> </ul> </li> <li>• <b>New MC Participant Inquiry</b></li> <li>• <b>MC Career Pathways (Norton Career Track and other future pathways)</b></li> </ul>
<b>University Career Center</b>	<ul style="list-style-type: none"> <li>• Career and Major Exploration (what can I do with this degree/exploring the world of work)</li> <li>• Student Employment Assistance (finding a job on/off-campus; work-study jobs)</li> <li>• Job Search (full-time employment upon graduation)</li> <li>• Resume Reviews</li> <li>• Mock Interviews (for job/graduate school prep)</li> <li>• Graduate School Exploration</li> <li>• Assistance with Conducting informational interviews</li> <li>• Assistance with finding volunteer/job shadowing opportunities</li> </ul>

<p><b>Cultural Center</b></p>	<ul style="list-style-type: none"> <li>• Looking to connect to other multicultural students and/or student organizations</li> <li>• Leadership development opportunities</li> <li>• Cultural &amp; Personal Support</li> <li>• Academic support</li> <li>• Personal guidance and advocacy</li> <li>• Diversity programming</li> <li>• DACA and Undocumented Student Services</li> <li>• Resources for diverse students pursuing STEM majors</li> <li>• Questions about Porter Scholarship program</li> </ul>
<p><b>Student Success Coordinators</b></p>	<ul style="list-style-type: none"> <li>• They're worried about paying a bill</li> <li>• They want to make a sustainable financial plan</li> <li>• They struggle with academic habits</li> <li>• Personal issues are affecting a student's grades</li> <li>• A student is unsure about his or her major</li> <li>• They're having a tough time balancing work and school</li> <li>• There's a hold on the student account</li> <li>• A student expresses doubts as to whether college is for him or her</li> <li>• They're frustrated about the registration process</li> <li>• A student needs help thinking through housing options</li> <li>• They're thinking about leaving UofL</li> <li>• A student has problems and is just not sure where to turn</li> </ul>
<p><b>Business Student Success Coordinator</b></p>	<ul style="list-style-type: none"> <li>• Holds on student account (other than ADV hold)</li> <li>• Looking to connect to other students and/or student organizations</li> <li>• A student has problems and is not sure where to turn</li> <li>• Housing, personal, and financial matters</li> <li>• Academic performance concern</li> <li>• Career planning</li> <li>• Transition to College</li> <li>• Withdrawal questions</li> </ul>

**Protocol for Referrals (cases)**

- Student contacted within 2 business days.
- Any communication relevant to the case should be documented in the case.
- Close cases after 30 days since the most recent contact with the student.

**Closed Case Reasons**

- The student received assistance
- Student contacted; no response from student
- Student never responded – no contact made
- Student contacted; declined help
- Possible error in referral
- Student contacted; no show to appointment
- The student dropped the course