# CardSmart Training

## Referrals in CardSmart

### When to refer to...

| Academic Advisors | • Course planning/registration matters/adjusting schedules  
|                   | • Withdrawing from courses  
|                   | • Full-time/part-time status or course loads  
|                   | • Academic petitions and policies (bankruptcy, repeating courses, etc.)  
|                   | • Unit specific questions  
|                   | • Academic performance concerns  
|                   | • Changing majors or adding minors  
|                   | • Questions regarding graduation/ degree progress |
| Metro College     | • **MC Employment Issue**  
|                   |   • Hours  
|                   |   • Leave of absence  
|                   |   • Work issues (want to quit UPS, issues with supervisors, etc.)  
|                   | • **MC Billing question**  
|                   |   • Students have questions on adding or dripping courses and how it will affect bill  
|                   |   • Fees  
|                   |   • Online Classes  
|                   |   • Not seeing MC on their bill (or an agreement on their MyMC page)  
|                   |   • Balances/financial holds  
|                   | • **MC Benefit Question**  
|                   |   • Eligibility  
|                   |   • Bonuses  
|                   |   • Work Commitment dates  
|                   | • **New MC Participant Inquiry**  
|                   | • **MC Career Pathways (Norton Career Track and other future pathways)** |
| University Career Center | • **Career and Major Exploration** (what can I do with this degree/exploring the world of work)  
|                         | • **Student Employment Assistance** (finding a job on/off-campus; work-study jobs)  
|                         | • **Job Search** (full-time employment upon graduation)  
|                         | • **Resume Reviews**  
|                         | • **Mock Interviews** (for job/graduate school prep)  
|                         | • **Graduate School Exploration**  
|                         | • **Assistance with Conducting informational interviews**  
|                         | • **Assistance with finding volunteer/job shadowing opportunities** |
| Cultural Center | • Looking to connect to other multicultural students and/or student organizations  
|                | • Leadership development opportunities  
|                | • Cultural & Personal Support  
|                | • Academic support  
|                | • Personal guidance and advocacy  
|                | • Diversity programming  
|                | • DACA and Undocumented Student Services  
|                | • Resources for diverse students pursuing STEM majors  
|                | • Questions about Porter Scholarship program  
| Student Success Coordinators | • They’re worried about paying a bill  
|                          | • They want to make a sustainable financial plan  
|                          | • They struggle with academic habits  
|                          | • Personal issues are affecting a student’s grades  
|                          | • A student is unsure about his or her major  
|                          | • They’re having a tough time balancing work and school  
|                          | • There’s a hold on the student account  
|                          | • A student expresses doubts as to whether college is for him or her  
|                          | • They’re frustrated about the registration process  
|                          | • A student needs help thinking through housing options  
|                          | • They’re thinking about leaving UofL  
|                          | • A student has problems and is just not sure where to turn  

**Protocol for Referrals (cases)**  
• Student contacted within 2 business days.  
• Any communication relevant to the case 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  
• Student contacted; declined help  
• Possible error in referral  
• Student contacted; no show to appointment  
• The student dropped the course