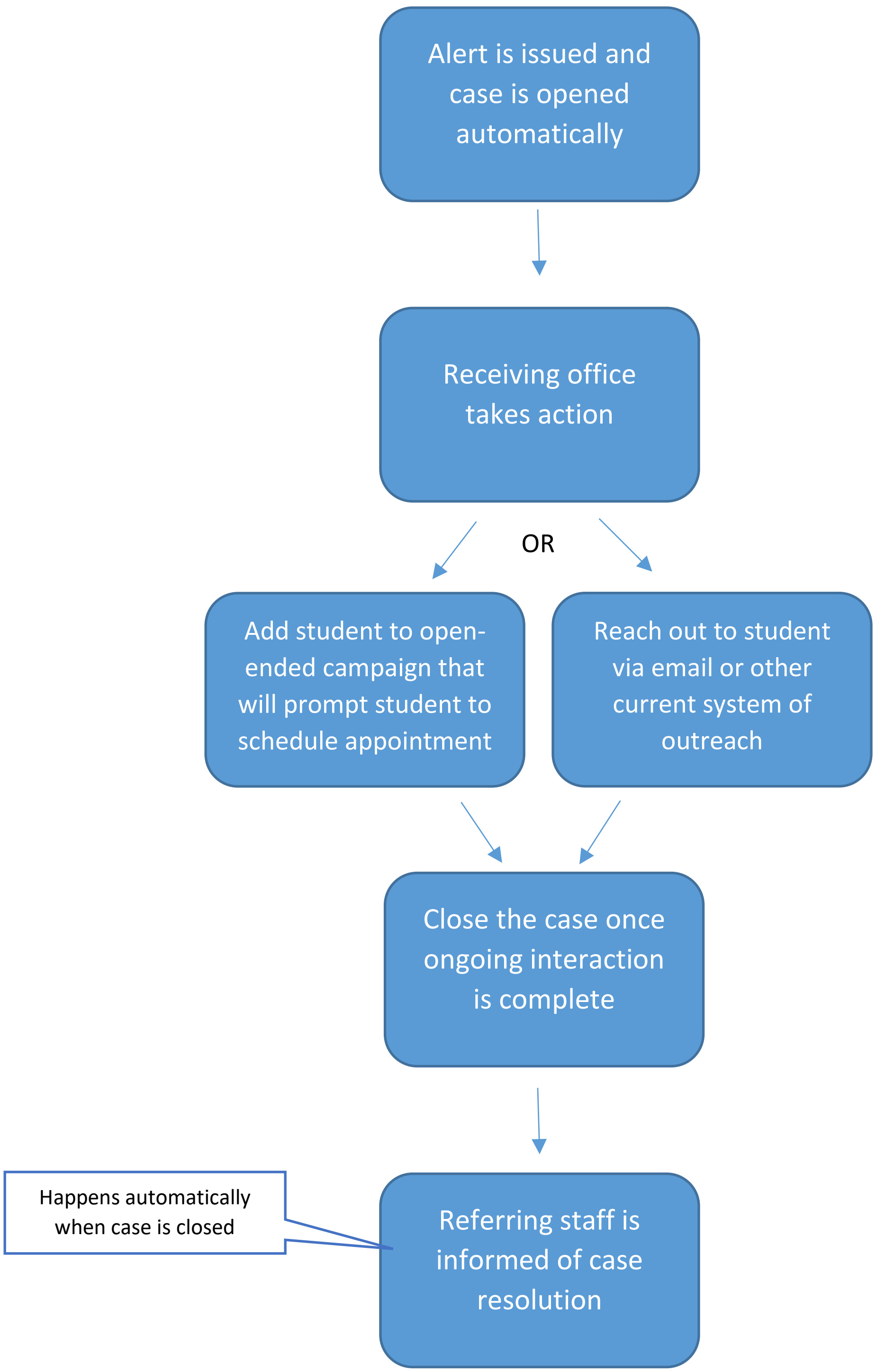
Training & Resources *Updated May 2022*

Receiving Alerts and Case Management

Overview:

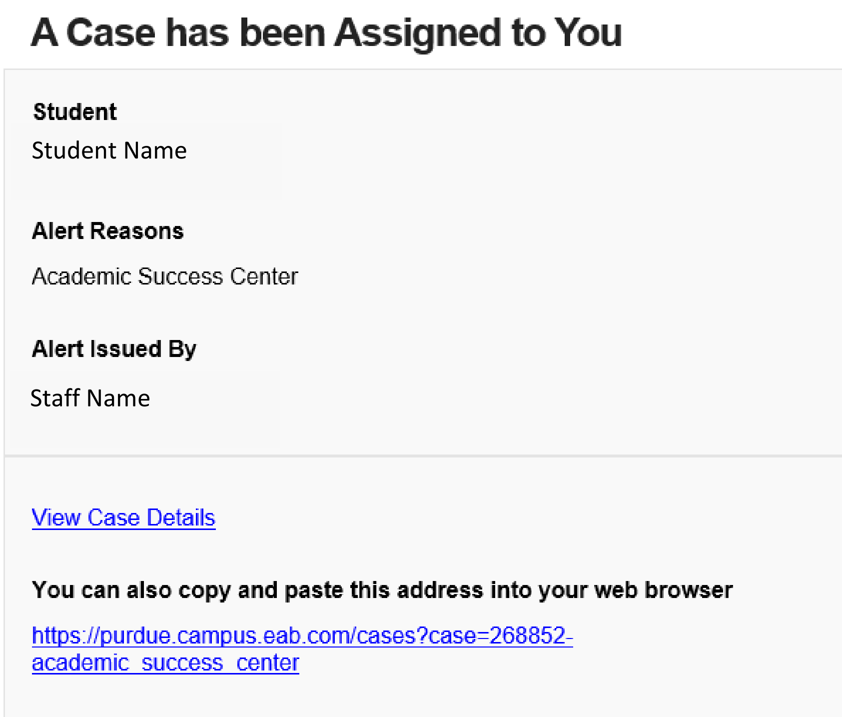
Alerts, or referrals, are made through BoilerConnect to help connect students to resources across campus and keep the loop of communication open among student serving offices. Purdue has two kinds of alerts – those that automatically open a case requiring action and those marked as "INFO ONLY" where the student is sent an automated email with additional information about a resource.

Recommended Workflow:



How to Assign Cases:

Often times, a central staff member is designated to receive notification of all alerts made through BoilerConnect for the office. If that person is passing the case to another staff member(s), they will need to assign the case to that person(s). This can be completed one of two ways once the initial case email is received:


A Case has been Assigned to You

Student
Student Name

Alert Reasons
Academic Success Center

Alert Issued By
Staff Name

View Case Details

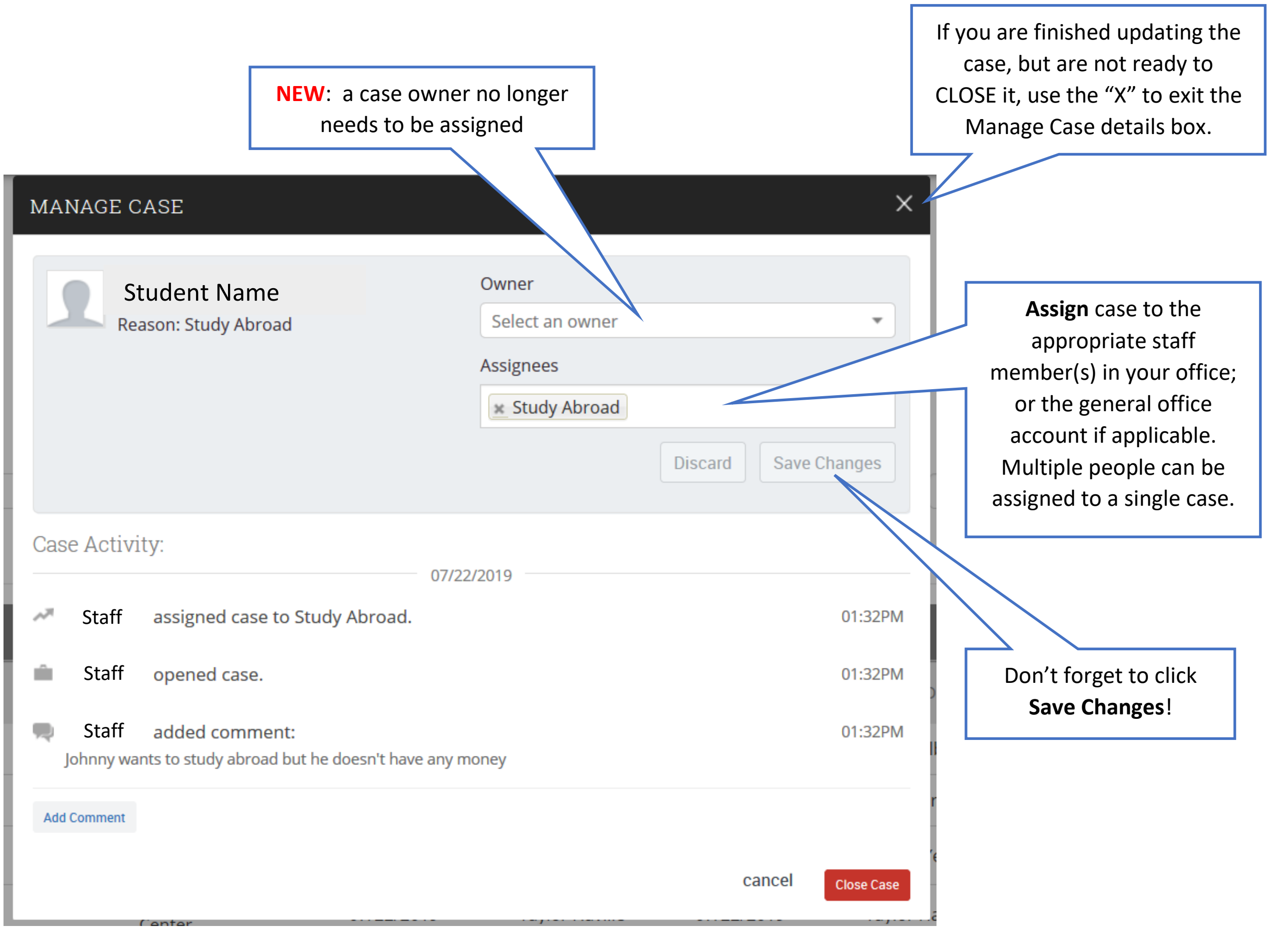
You can also copy and paste this address into your web browser
https://purdue.campus.eab.com/cases?case=268852-academic_success_center

<u>Option 1:</u>

Once the case email is received, the email can be forwarded to the appropriate staff member to handle. That staff member would need to click on the "View Case Details" link. This takes them to the Cases screen within BoilerConnect and automatically brings up the Manage Case details for that particular student case. The first step is to assign themselves to the case following the instructions below.

<u>Option 2:</u>

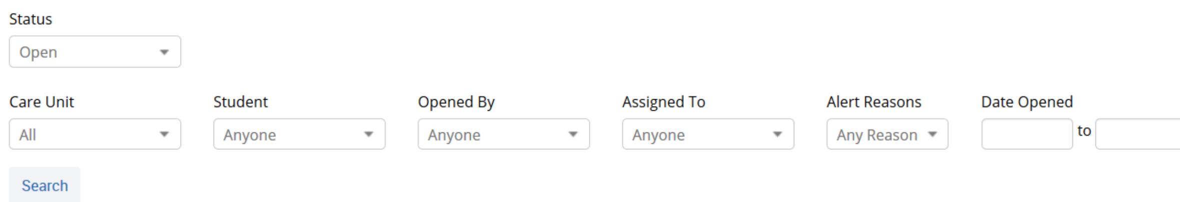
Once the case email is received, click on the "View Case Details" link. This takes you to the Cases screen within BoilerConnect and automatically brings up the Manage Case details for that particular student case. In this option, the staff member who received the alert email for the office would first assign the appropriate staff members to the case following the instructions below.



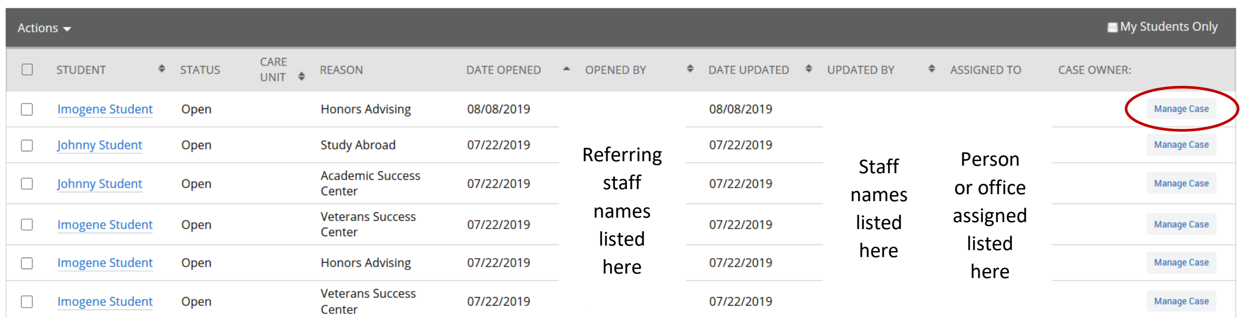
Managing and Closing Cases:

You can access all of your open cases to manage or close them from the Cases icon located on the menu bar on the left side of the screen.

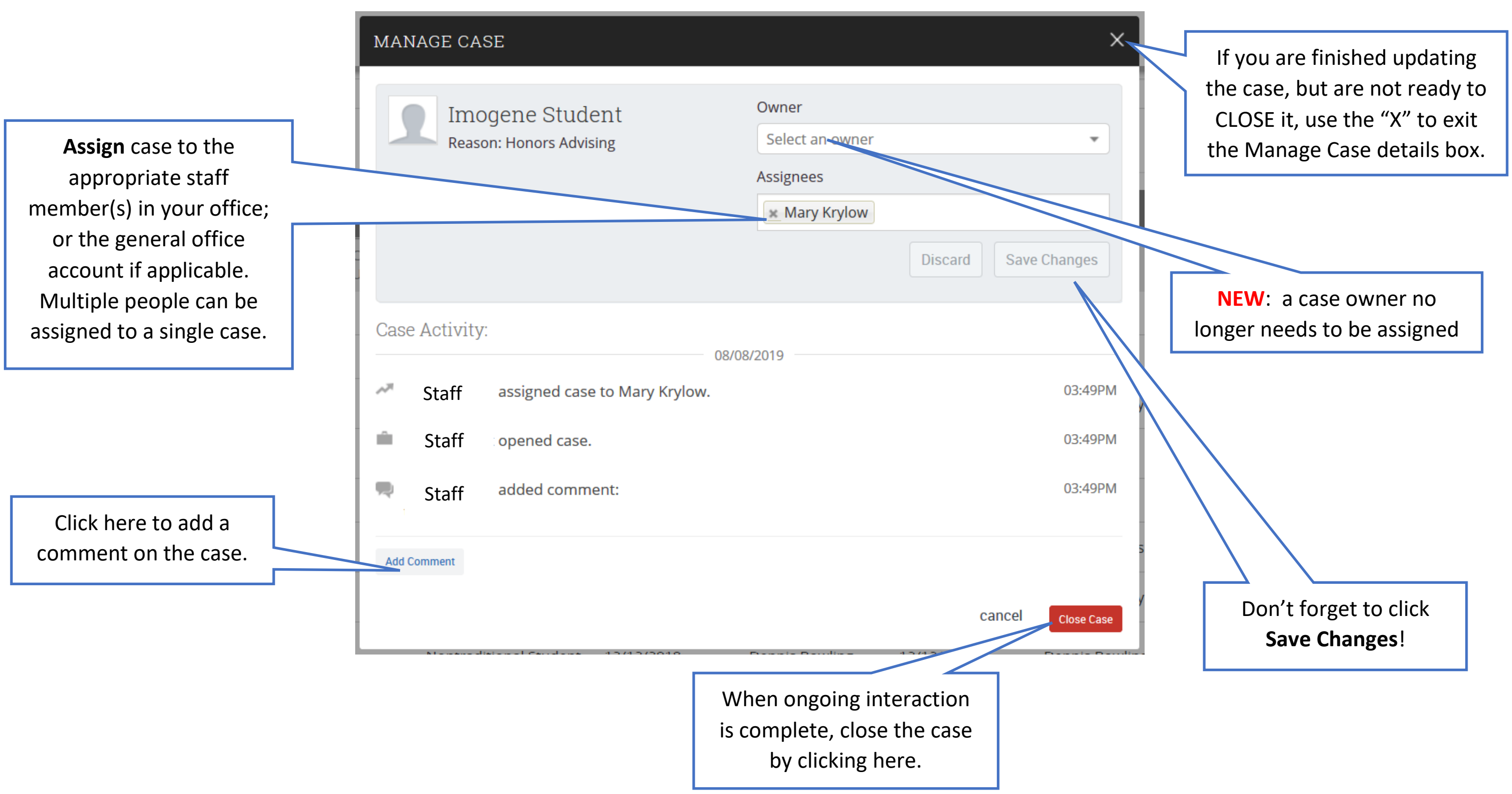
You will see a list of all open cases for you. You can use the filters near the top of the screen to drill down the list if needed.



From the list of cases, click “Manage Case” to update or close the case for a particular student alert.



This will open up the Manage Case details for that particular student case. From here you can update the Assignees if needed. You can also add comments or close the case.

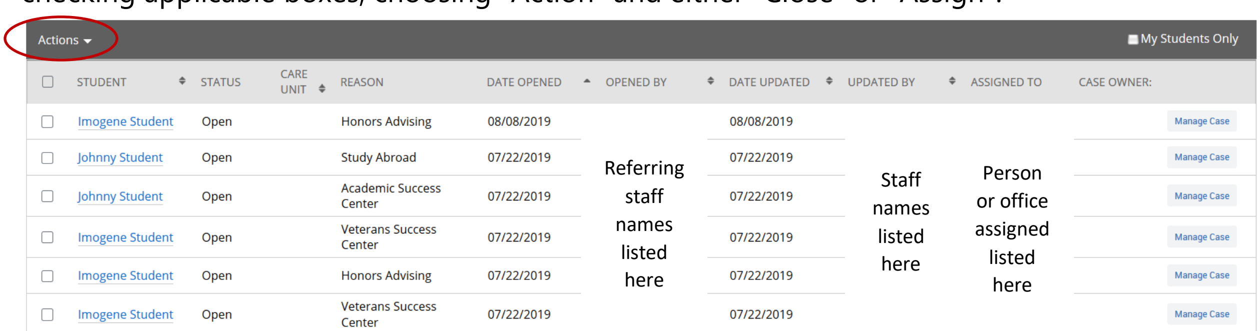


When you Close a case, you will have five outcomes to choose from:

- **Case closed** – used once interaction is complete. It is helpful to add a comment and include date information about a Report on Appointment if applicable.
- **No response from student** – used when repeated outreach to student has resulted in no response from the student.
- **Providing ongoing support** – used when you are actively working with the student and ongoing interaction is taking place.
- **Referral acknowledged** – used by offices dealing with confidential material (example: DRC).
- **Seeking ongoing support** – used when making a more appropriate referral. It is helpful to include a comment with information regarding the new referral. In this scenario, a new alert would need to be made to the campus resource you are referring the student to.

Things to Remember:

- Cases can be closed by both Case Owners and Assignees.
- Cases are able to be reopened. If a case has been closed, but a student communicates with your office, Case Owners and Assignees have the ability to reopen previously closed cases.
- It is recommended to close outstanding open cases at the end of each semester.
- The key task when working with cases is closing the case when ongoing interaction is complete.
- Cases can be mass closed or assigned (to a single person) from the main Cases page by checking applicable boxes, choosing "Action" and either "Close" or "Assign".



STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:	
Imogene Student	Open		Honors Advising	08/08/2019	Referring staff names listed here	08/08/2019	Staff names listed here	Person or office assigned listed here		Manage Case
Johnny Student	Open		Study Abroad	07/22/2019		07/22/2019				Manage Case
Johnny Student	Open		Academic Success Center	07/22/2019		07/22/2019				Manage Case
Imogene Student	Open		Veterans Success Center	07/22/2019		07/22/2019				Manage Case
Imogene Student	Open		Honors Advising	07/22/2019		07/22/2019				Manage Case
Imogene Student	Open		Veterans Success Center	07/22/2019		07/22/2019				Manage Case