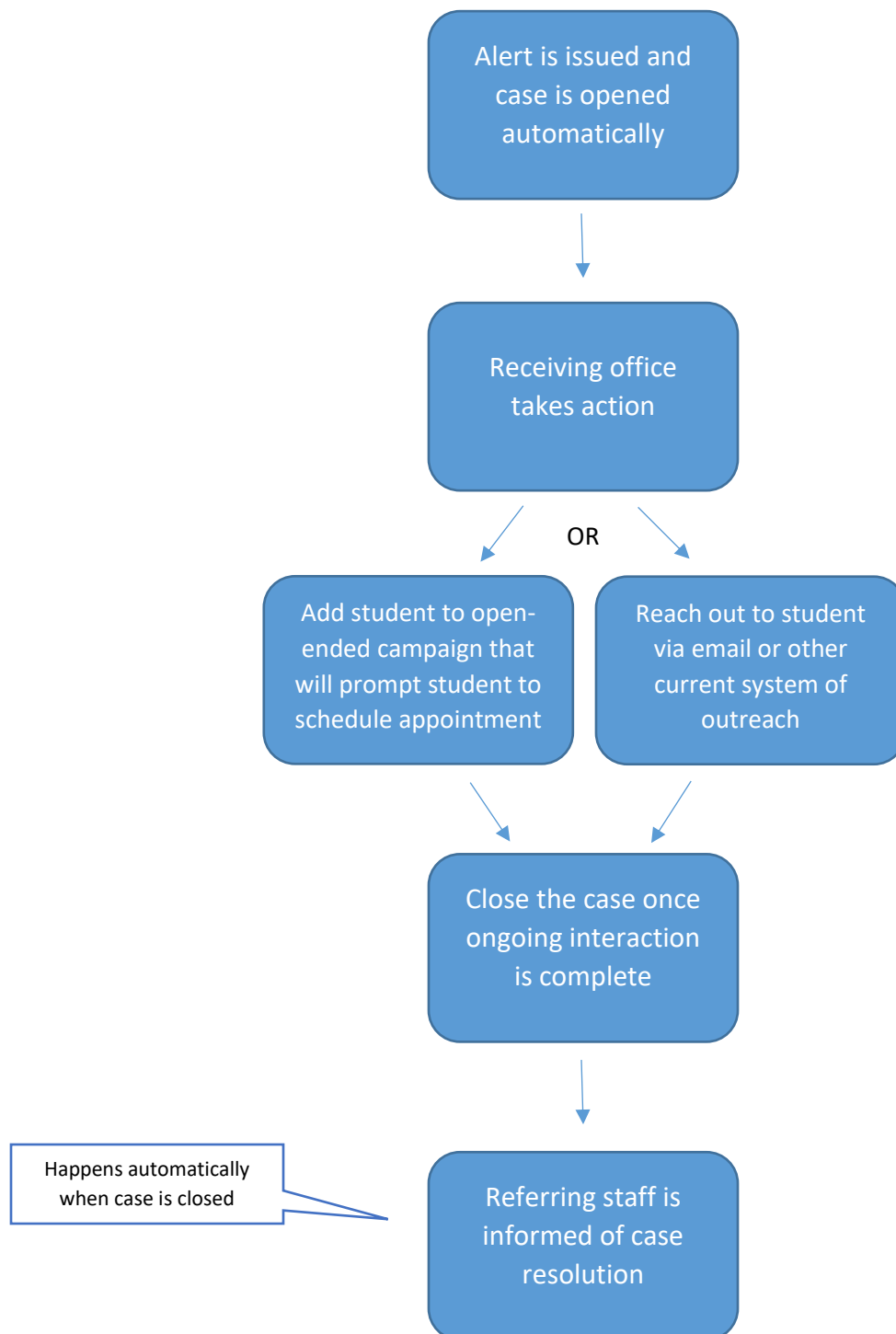


BoilerConnect – Alerts and Case Management Workflow

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. The following is specific to those cases that open a case and require action be taken by the receiving office.

Recommended Workflow:



Viewing Case Information:

You can access all cases 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 on campus. Use the filters near the top of the screen to drill down the list to search different parameters.

To view all open cases for students assigned to you, click the checkbox next to "My Students Only."

Status
Open

Care Unit: All | Student: Anyone | Opened By: Anyone | Assigned To: Anyone | Alert Reasons: Any Reason | Date Opened: [] to []

Search



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

To view any activity, including all comments, in the case for a specific student, click the Manage Case button.

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		08/08/2019			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

Referring staff names listed here

Staff names listed here

Person or office assigned listed here

Case activity will be displayed in the pop-up box.

MANAGE CASE ✕

Johnny Student
Reason: Study Abroad

Owner
Select an owner

Assignees
✕ Study Abroad

[Discard](#) [Save Changes](#)

Case Activity: 07/22/2019

- Staff** assigned case to Study Abroad. 01:32PM
- Staff** opened case. 01:32PM
- Staff** added comment: 01:32PM
Johnny wants to study abroad but he doesn't have any money

[Add Comment](#)

cancel [Close Case](#)

Use the "X" to exit the Manage Case details

Click here to add an additional comment if needed.

When ongoing interaction is complete, the OFFICE RECEIVING THE ALERT will close the case.
As the referring staff member, you should use the "X" in the top right corner to exit the Manage Case details box.