## **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  | Student   |   | Opened By   | Assign   | ied To  | Alert Reason                     | s Da  | ite Opened |  |
| All  | Anyone  | •   | Anyone  | ▼ Anyo   | one 🔹   | Any Reason                       | •   | t          | 0  |
| Search   |   |   |   |  |   |                                  |   |            |  |
|  |   |   |   |  |   |                                  |   |            |  |
| Actions <del>-</del>   |   |   |   |  |   |                                  |   | (          | My Students Only   |
| Actions ←  | TATUS CARE<br>UNIT \$                                       | REASON  | DATE OPENED   | <ul> <li>OPENED BY</li> </ul>  | DATE UPDATED  | UPDATED BY                       | ASSIGNED T  |            | My Students Only   |
| Actions -<br>STUDENT + S   | TATUS CARE<br>UNIT \$                                       | REASON<br>Honors Advising   | DATE OPENED<br>08/08/2019   | <ul> <li>OPENED BY</li> </ul>  | <ul> <li>DATE UPDATED +</li> <li>08/08/2019</li> </ul>  | UPDATED BY                       | ASSIGNED T  | O CASE O   | My Students Only<br>WNER:<br>Manage Case   |
| Actions    STUDENT    STUDENT  | CARE<br>UNIT ♦<br>Open<br>Open                              | REASON<br>Honors Advising<br>Study Abroad   | DATE OPENED<br>08/08/2019<br>07/22/2019   | OPENED BY     Beferring  | DATE UPDATED     O8/08/2019     07/22/2019  | UPDATED BY                       | ASSIGNED T  | TO CASE OF | My Students Only WNER: Manage Case Manage Case   |
| Actions -<br>STUDENT + S<br>Imogene Student C<br>Johnny Student C<br>Johnny Student C  | TATUS CARE<br>UNIT ¢<br>Open<br>Open                        | REASON<br>Honors Advising<br>Study Abroad<br>Academic Success<br>Center                               | DATE OPENED<br>08/08/2019<br>07/22/2019<br>07/22/2019                             | <ul> <li>OPENED BY</li> <li>Referring<br/>staff</li> </ul>   | <ul> <li>DATE UPDATED</li> <li>08/08/2019</li> <li>07/22/2019</li> <li>07/22/2019</li> </ul>            | UPDATED BY                       | ASSIGNED T  | n          | My Students Only WNER: Manage Case Manage Case Manage Case   |
| Actions   STUDENT  STUDENT  STUDENT  Actions  Actions  STUDENT  Actions  Actions Actions  Actions Actions  Actions Actions Actions  Actions Act | Dpen CARE UNIT •<br>Dpen Dpen Dpen Dpen Dpen Dpen Dpen Dpen | REASON<br>Honors Advising<br>Study Abroad<br>Academic Success<br>Center<br>Veterans Success<br>Center | DATE OPENED 08/08/2019 07/22/2019 07/22/2019 07/22/2019                           | <ul> <li>OPENED BY</li> <li>Referring<br/>staff<br/>names<br/>litted</li> </ul>                    | <ul></ul>   | Staff<br>names<br>listed         | <ul> <li>ASSIGNED T</li> <li>Person<br/>or offic<br/>assigne</li> </ul> | n          | My Students Only<br>WNER:<br>Manage Case<br>Manage Case<br>Manage Case                               |
| Actions -<br>STUDENT + S<br>Imogene Student C<br>Johnny Student C<br>Imogene Student C<br>Imogene Student C<br>C   | Dpen CARE UNIT +<br>Dpen Dpen Dpen Dpen Dpen Dpen Dpen Dpen | REASON<br>Honors Advising<br>Study Abroad<br>Academic Success<br>Center<br>Veterans Success<br>Center | DATE OPENED<br>08/08/2019<br>07/22/2019<br>07/22/2019<br>07/22/2019<br>07/22/2019 | <ul> <li>OPENED BY</li> <li>Referring<br/>staff</li> <li>names</li> <li>listed<br/>here</li> </ul> | DATE UPDATED      O8/08/2019     O7/22/2019     O7/22/2019     O7/22/2019     O7/22/2019     O7/22/2019 | Staff<br>names<br>listed<br>here | Person<br>or offic<br>assigne<br>listed                                 | n          | My Students Only<br>WNER:<br>Manage Case<br>Manage Case<br>Manage Case<br>Manage Case<br>Manage Case |

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

| Actio | ns 🔻            |        |                |                            |             |   |                 |   |              |                |   |             | My          | Students Only | / |
|-------|-----------------|--------|----------------|----------------------------|-------------|---|-----------------|---|--------------|----------------|---|-------------|-------------|---------------|---|
|       | STUDENT 🗢       | STATUS | CARE<br>UNIT 💠 | REASON                     | DATE OPENED | ^ | OPENED BY       | ¢ | DATE UPDATED | UPDATED BY     | ¢ | ASSIGNED TO | CASE OWNER: | $\frown$      |   |
|       | Imogene Student | Open   |                | Honors Advising            | 08/08/2019  |   |                 |   | 08/08/2019   |                |   |             |             | Manage Case   | ) |
|       | Johnny Student  | Open   |                | Study Abroad               | 07/22/2019  |   | Referring       |   | 07/22/2019   |                |   | Porcon      |             | Manage Case   |   |
|       | Johnny Student  | Open   |                | Academic Success<br>Center | 07/22/2019  |   | staff           |   | 07/22/2019   | Staff<br>names |   | or office   |             | Manage Case   |   |
|       | Imogene Student | Open   |                | Veterans Success<br>Center | 07/22/2019  |   | names<br>listed |   | 07/22/2019   | listed         |   | assigned    |             | Manage Case   |   |
|       | Imogene Student | Open   |                | Honors Advising            | 07/22/2019  |   | here            |   | 07/22/2019   | here           |   | here        |             | Manage Case   |   |
|       | Imogene Student | Open   |                | Veterans Success<br>Center | 07/22/2019  |   |                 |   | 07/22/2019   |                |   |             |             | Manage Case   |   |

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

|  | MANAGE CASE   | ×、   |   |
|--|---|--|---|
|  | Johnny Student<br>Reason: Study Abroad                      | Owner Select an owner Assignees  Study Abroad Discard Save Changes           | Use the "X" to exit t<br>Manage Case detai  |
|  | Case Activity:<br>07 07 Staffassigned case to Study Abroad. | /22/2019   |   |
|  | Staff opened case.  | 01:32PM  |   |
|  | Add Comment   | y money  |   |
| k here to add an<br>tional comment if<br>needed. | f anter   | Cancel Close Case  |   |
|  |   | When ongoing interaction is compl<br>RECEIVING THE ALERT will clos           | lete, the OFFICE<br>se the case.            |
|  |   | As the referring staff member, you sh the top right corner to exit the Manag | ould use the "X" in<br>ge Case details box. |