

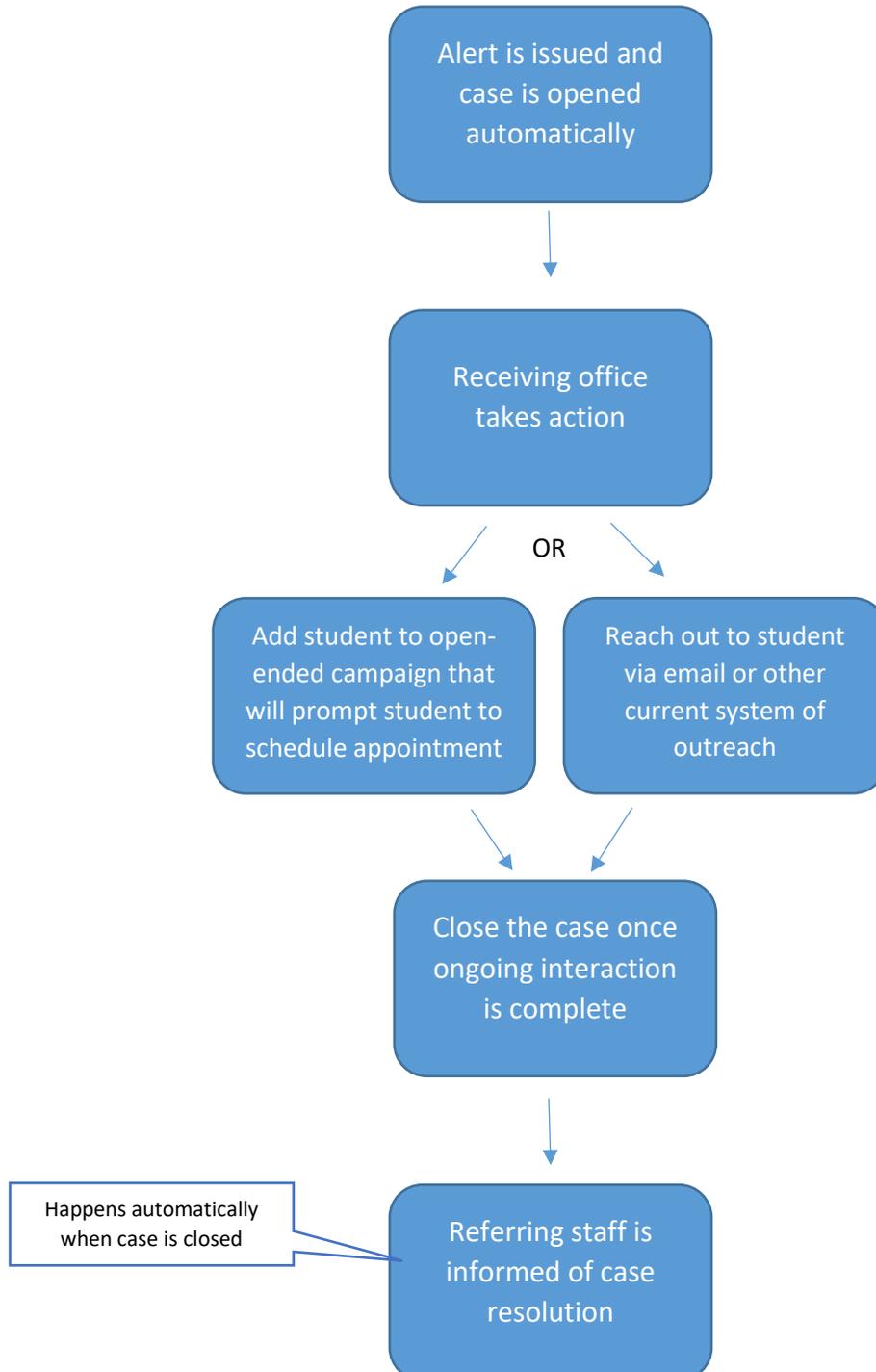


## Receiving Alerts and Case Management

### 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](https://purdue.campus.eab.com/cases?case=268852-academic_success_center)

#### Option 1:

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.

#### Option 2:

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.

**NEW:** a case owner no longer needs to be assigned

If you are finished updating the case, but are not ready to CLOSE it, use the "X" to exit the Manage Case details box.

**Assign** case to the appropriate staff member(s) in your office; or the general office account if applicable. Multiple people can be assigned to a single case.

Don't forget to click **Save Changes!**

The screenshot shows a 'MANAGE CASE' window with a student profile, an 'Owner' dropdown menu, and an 'Assignees' list containing 'Study Abroad'. There are 'Discard' and 'Save Changes' buttons. Below is a 'Case Activity' log with three entries from 'Staff' dated 07/22/2019. At the bottom right are 'cancel' and 'Close Case' buttons.

### 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.

Status

Care Unit:  Student:  Opened By:  Assigned To:  Alert Reasons:  Date Opened:  to

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

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

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.

**MANAGE CASE** ✕

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**Imogene Student**  
Reason: Honors Advising

Owner:

Assignees:

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Case Activity: 08/08/2019

- Staff** assigned case to Mary Krylow. 03:49PM
- Staff** opened case. 03:49PM
- Staff** added comment: 03:49PM

Assign case to the appropriate staff member(s) in your office; or the general office account if applicable. Multiple people can be assigned to a single case.

Click here to add a comment on the case.

When ongoing interaction is complete, close the case by clicking here.

If you are finished updating the case, but are not ready to CLOSE it, use the "X" to exit the Manage Case details box.

**NEW:** a case owner no longer needs to be assigned

Don't forget to click **Save Changes!**

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".

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