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:

1. Alert is issued and case is opened automatically
2. Receiving office takes action
   - OR
   - Add student to open-ended campaign that will prompt student to schedule appointment
   - Reach out to student via email or other current system of outreach
3. Close the case once ongoing interaction is complete
4. Referring staff is informed of case resolution

Happens automatically when case is closed
**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.”
To view any activity, including all comments, in the case for a specific student, click the Manage Case button.

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

Use the “X” to exit the Manage Case details box.

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.