Issue Alerts/Cases

Making student referrals

**Issue Alerts**

1. **Step One:** In Spring 2017, the university began using the alert option within the BHSC platform for student referrals. Advisors can easily connect students to the support resources they need by clicking on the Issue an Alert link. Access the link on the Advisor Home page or from an individual student’s profile. If accessing from Advisor Home, users will need to first identify the student.

   ![Issue an Alert form](image)

   - **Referral Reason** - After identifying the student, select the reason. This signifies which office will receive the referral. **Reasons currently include:**
     1. Student Financial Services Referral
     2. Dean of Students Referral
     3. Career Services Referral
     4. Residential Life Referral
     5. Disability Support Services Referral

   - **Basic Advising/Academic Alert** – This alert reason is currently associated with Athletic Progress Report Campaigns (the academic monitoring they conduct on student athletes.) If using this reason outside of an Athletics’ Campaign, the alert details will simply live on the
student’s BHSC profile. This alert reason does not create a referral/case to an actual office on-campus.

- □ Additional Comments – Add text details that would benefit the office receiving the referral. Please note that these text details remain in the platform and are viewable to other users with access to that student’s record. Comparable to advising notes, users are encouraged to use discretion and not enter personally sensitive information within the alert. **Click Submit.**

2. **Step Two:** Issued alerts appear on the student’s profile in two ways – on the overall right-hand menu and on the History tab. Within the History tab, users can view the details associated with the alert including reason, text and issuer.

3. **Step Three:** Students are not aware of the alert or of the text details within the referral*. The alert reason notifies the following individuals to manage the case and triage the situation. These individuals will involve other office staff, as appropriate, and connect with the student, outside of the BHSC platform.

   i. Student Financial Services Referral – Carla Lord-Powalski
   ii. Dean of Students Referral – Adam Cantley
   iii. Career Services Referral – Rachel Coppola
   iv. Residential Life Referral – Katherine Morrison
   v. Disability Support Services Referral – Anne Jannarone
- *Career Services Referrals – Alerts issued to Career Services sends the student an email (the email does not include text from the actual alert) but links them to the Career Handshake site with details surrounding how to make an appointment with Career Services.

**Cases**

1. **Step One:** Issuing an alert/referral to one of the aforementioned offices creates a case for their identified staff member.

   - The person who originally issued the alert/created the case should receive an email alerting them the case is closed. Users are able to see the details of the managed case including any comments from the staff member within the case details on the student’s profile. This provides assurance that proper assistance was provided to the student after the issued alert/referral.

   ![Case Closed](Image)