Buckeye Link Phone Contact-to-Case Flow

Customer calls

- The customer may be a student or someone related to a student, such as a parent.
- The customer provides their name and the student information.

Review SIS

- If the student is an applicant, current, or former student, look up the account in SIS and research the inquiry.
- Determine if FERPA applies by checking the applicant status and SIR, check for student groups, special populations, etc.

Review the contact record

- Check the student's contact record for the 'refer to staff' notation and any other information.
- Review previous cases. If the inquiry is in reference to a prior topic/conversation, open the previous case topic and review the case activity.
- If no contact record exists for the student within Salesforce, create the contact record.

Respond to the inquiry

- Only release account-specific details to the customer if we are authorized based on FERPA guidelines, regardless of any relationships set within Salesforce.
- Follow-up directly with the student as necessary within the same case.

Case documentation

- If the conversation is a new inquiry/topic, create a case to document your conversation. See the case creation reference guide for further details.
- If the conversation is in reference to a previous case, document your conversation using the "Add Note" tab on the existing case.
- If the inquiry is from someone related to the student, such as a parent, list the contact in the "additional contacts referenced" section of the case.

Additional case actions

- Use the 'Add Note' option if you are documenting further actions taken on a case, such as a follow-up call or if you are later need to submit a revision/action request.
- When applicable, collaborate with other Salesforce users or groups through posts/comments (chatter).
- If follow-up is required, set the case status to pending. Create a new task associated with the case to schedule a reminder to follow-up.
- If no further action is required, set the case status to closed.
- When closing a case, select the appropriate category, subcategory, and opportunties related to the inquiry.