# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)

# Process Document

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**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**Student Advice Wellbeing**

**Creating a Case: Subjects & Workflows**

Version 0.2 November 2018

Author: DS Business Support Team

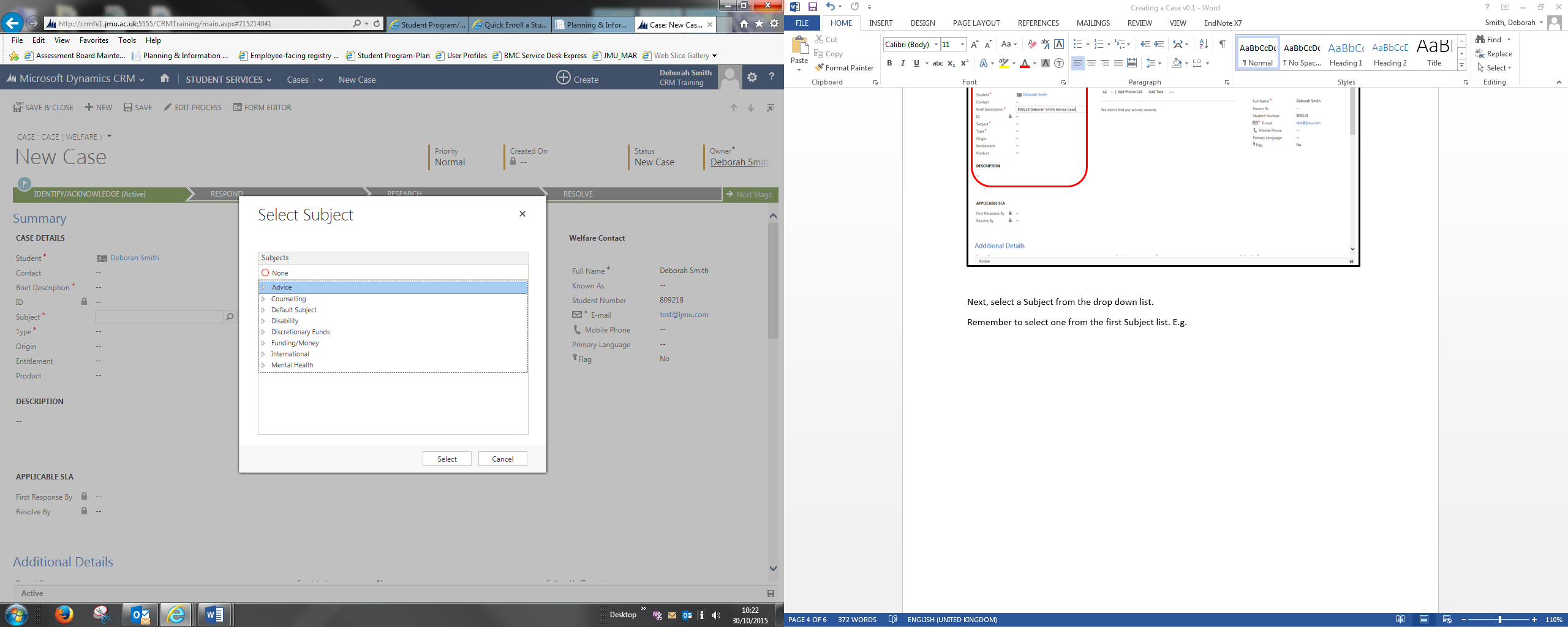
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4. **Importance of Subjects and Workflows in CRM**

The Top Line Subject drives the Process Flow (case stages), and should be selected initially to drive the correct Case Type. It is important that your drill down to a Sub Subject at a later date prior to closure. This is for accurate reporting. The process on how to do this is detailed in the Changing the Subject document.

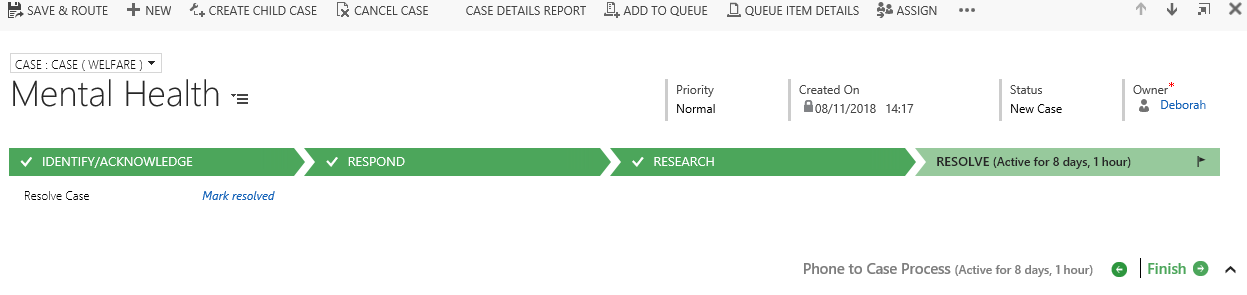
However, if a Sub Subject is selected when creating a Case and this brings up the wrong Process flow, then you can switch Process. The Changing the Process Workflow steps are detailed at the end of this document.

**Current Top Line Subjects are as follows:**



1. **Process Flows & Subjects**
   1. Advice Cases

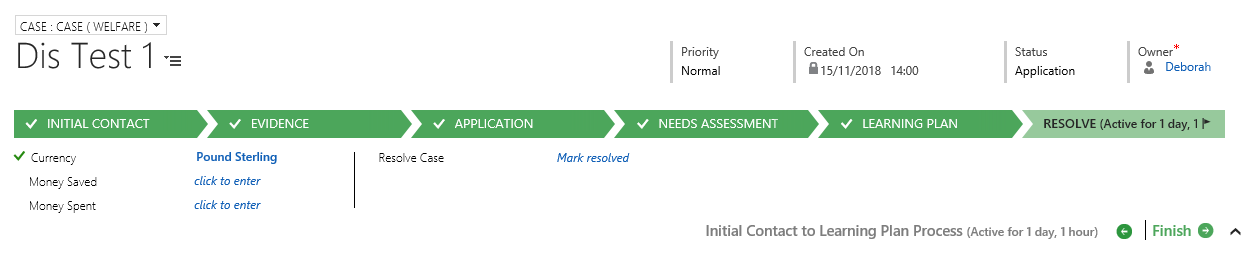
Advice cases will follow the **Phone to Case Process**. This is a simple workflow, as displayed below:



Top Line Subjects which will drive this workflow are:

* **Advice**
* **Student Engagement**
* **Funding/Money**
* **Mental Health**
* **International**
* **Study Skills Disability**
* **Vulnerable Student**
  1. **Disability Cases**

Disability cases follow a different Workflow, called **Initial Contact to Learning Plan Process**. This is displayed below:



Top Line Subjects which will drive this flow are:

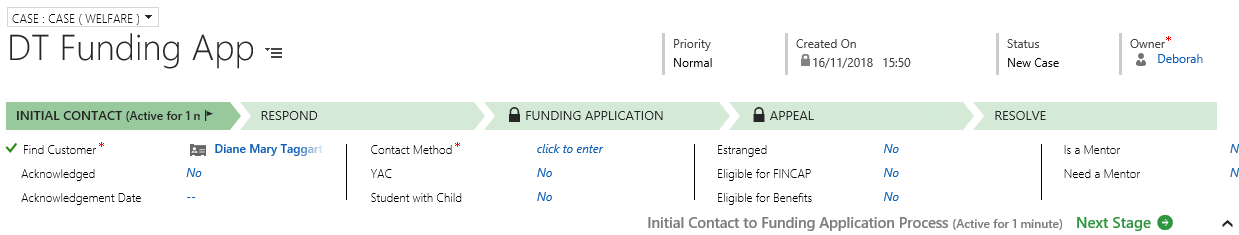
* **Disability**
  1. **Funding Cases:**

The Funding Team use two different flows depending upon the type of case it is.

If the case is an **ADVICE** case then the subject will be **Funding/Money** and the Workflow will be the **Simple Phone to Case Process**. The chevrons across the top will display as below:

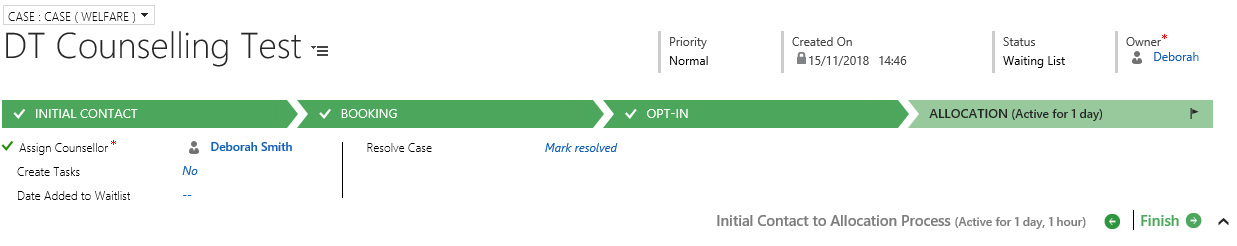


If the case involves a **FUNDING APPLICATION** then the subject will be **Discretionary Funds** and the Workflow will be the **Initial Contact to Funding Application Process**. The chevrons across the top will display as below:



* 1. **Counselling Cases**

Counselling Cases will follow **the Initial Contact to Allocation Process Workflow**, as displayed below.



Subjects which will drive this flow are:

* **Counselling**

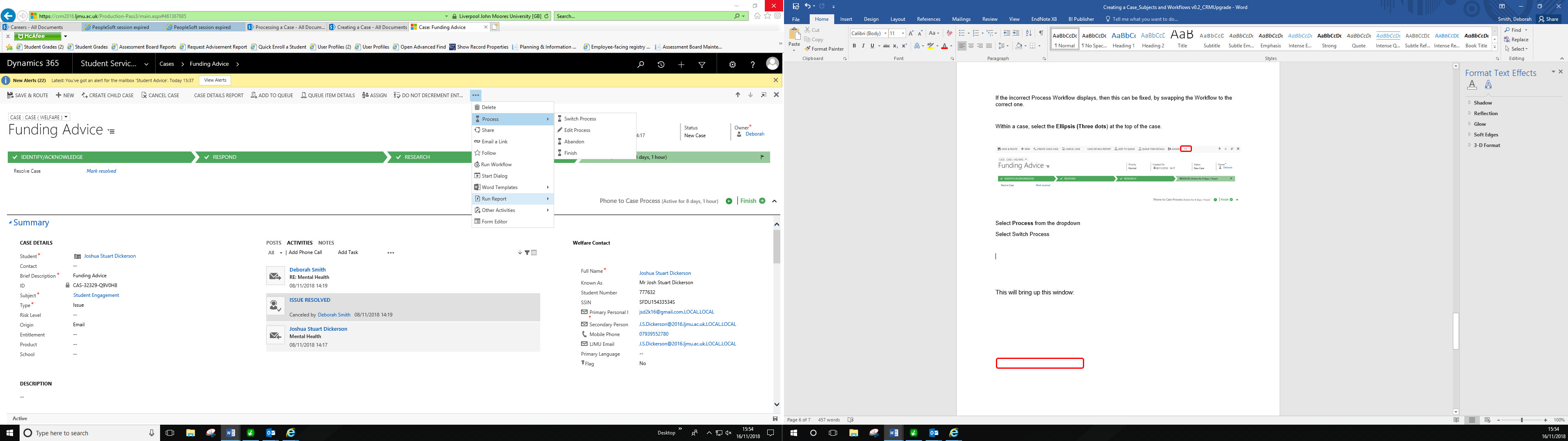
1. **Changing the Process Workflow**

If the incorrect Process Workflow displays, then this can be fixed, by swapping the Workflow to the correct one.

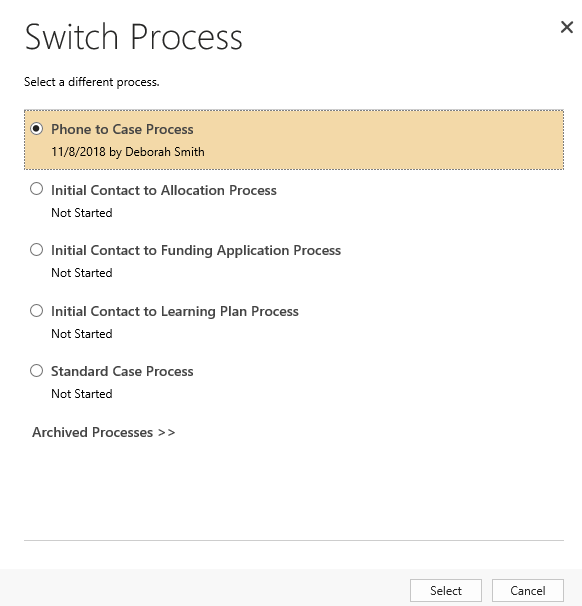
Within a case, select the **Ellipsis (Three dots**) at the top of the case.



* Select **Process** from the dropdown
* Select **Switch Process**



This will bring up this window:



1. The process you have selected currently will be highlighted, but you can select any of the options to switch the process to the correct Workflow.
2. Click **Select** to Switch

**Please Note: You may also need to change the Subject. Please refer to the Changing the Subject of a Case document.**