Managing Clients, Cases and Tasks

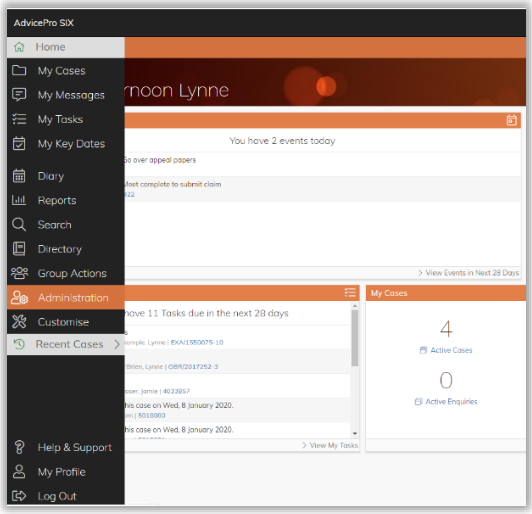
Overview

- You can allocate cases and tasks to a particular adviser
- A notification of the allocation can be sent to the new adviser
- Any associated appointments can be allocated at the same time
- You can close multiple cases in one action

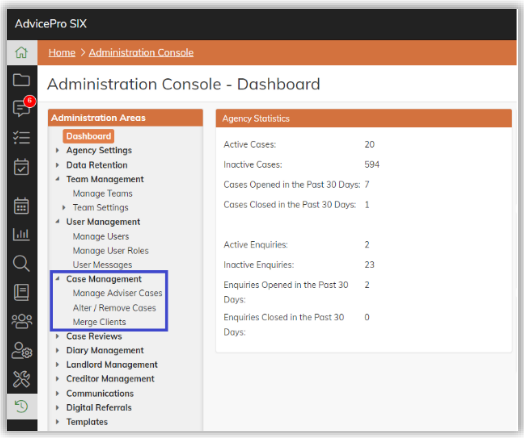
ⓘ You can only access the agency profile if you have **Agency Manager** permissions.

Case Management

Hover your mouse over the black panel on the left-hand side of your screen and click on **Administration.**

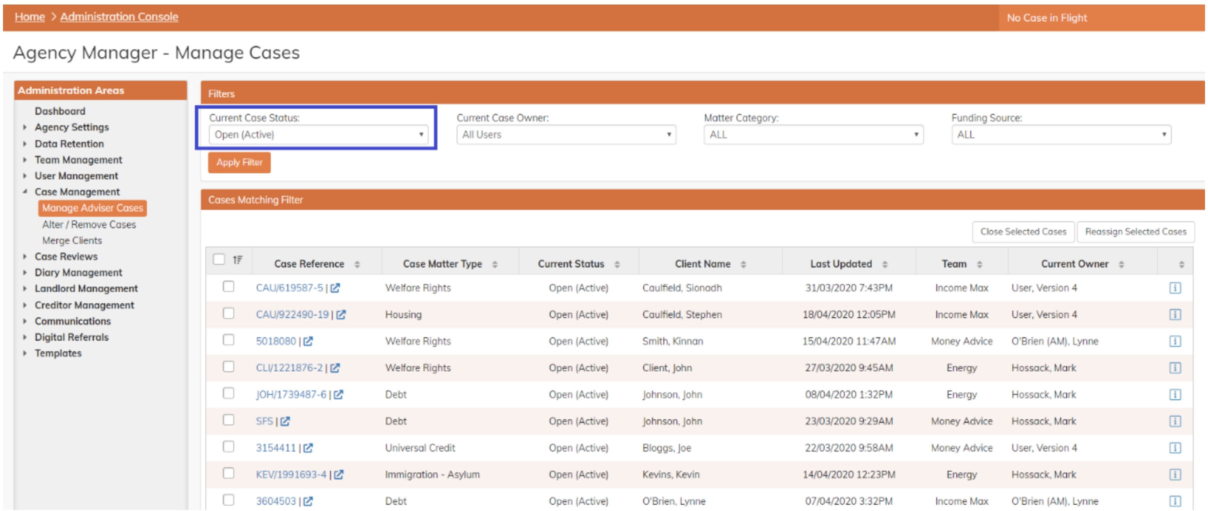


Click **Case Management** and a list of options will display.



Manage Adviser Cases

Initially, only Open (Active) cases are displayed.



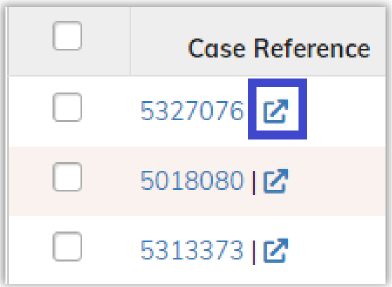
- Select from the dropdown list **Current Case Status** to see cases with a different status, including enquiries.

- Select a different **Current Case Owner** from the list to see cases currently allocated to a different adviser or **All Users** to include cases regardless of the currently allocated adviser.

- Click **Apply Filter** to update this list to reflect your changes.

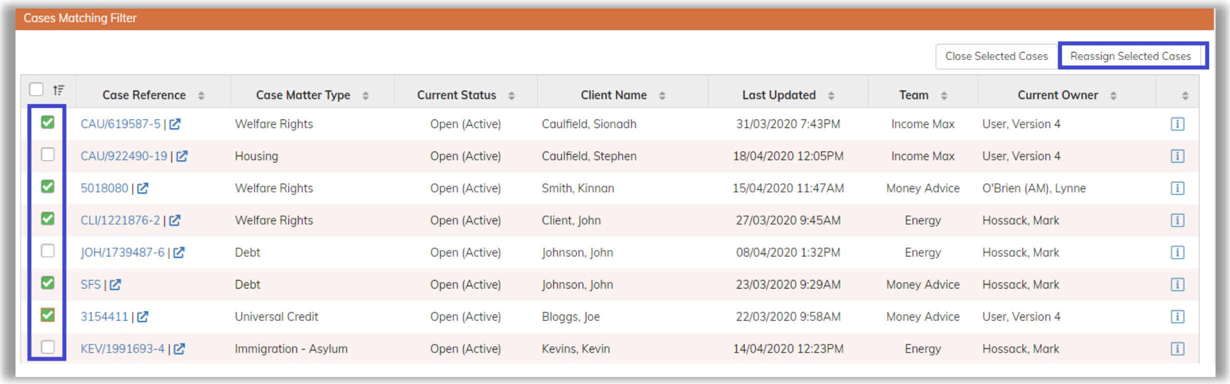
- Click on the any of the column headings to sort the list by that value.

- Click on the case reference to access details of a particular case. You can view and access the case in a different browser tab by clicking on the arrow beside the case reference. This allows your chosen options to remain on one page and giving you access to inidividual cases via a separate tab. You can have as many cases open on several tabs as you wish.



Assign Cases to a Different Adviser

- Select the cases that you want to reassign by ticking the boxes on the left of each row.


Cases Matching Filter

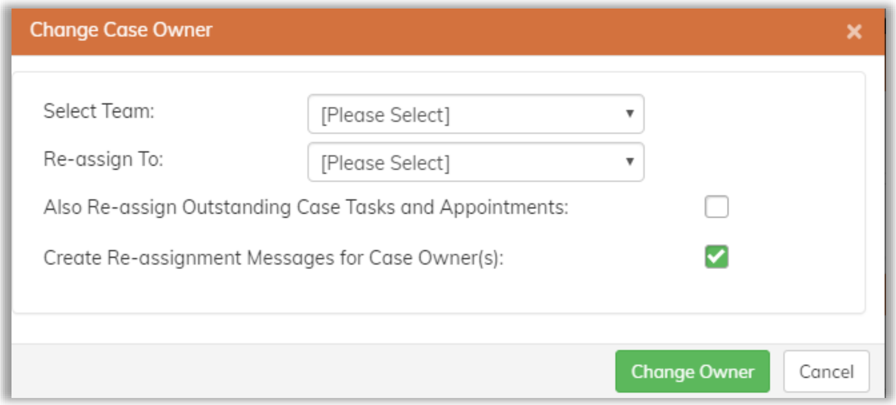
Close Selected Cases | Reassign Selected Cases

	Case Reference	Case Matter Type	Current Status	Client Name	Last Updated	Team	Current Owner
☑	CAU/619587-5	Welfare Rights	Open (Active)	Caulfield, Sionadh	31/03/2020 7:43PM	Income Max	User, Version 4
☐	CAU/922490-19	Housing	Open (Active)	Caulfield, Stephen	18/04/2020 12:05PM	Income Max	User, Version 4
☑	5018080	Welfare Rights	Open (Active)	Smith, Kinnan	15/04/2020 11:47AM	Money Advice	O'Brien (AM), Lynne
☑	CLI/1221876-2	Welfare Rights	Open (Active)	Client, John	27/03/2020 9:45AM	Energy	Hossack, Mark
☐	JOH/1739487-6	Debt	Open (Active)	Johnson, John	08/04/2020 1:32PM	Energy	Hossack, Mark
☑	SFS	Debt	Open (Active)	Johnson, John	23/03/2020 9:29AM	Money Advice	Hossack, Mark
☑	3154411	Universal Credit	Open (Active)	Bloggs, Joe	22/03/2020 9:58AM	Money Advice	User, Version 4
☐	KEV/1991693-4	Immigration - Asylum	Open (Active)	Kevins, Kevin	14/04/2020 12:23PM	Energy	Hossack, Mark

- Click **Reassign Selected Cases**

- The **Change Case Owner** box appears.

- Select the team (if appropriate) and new owner from the list. Optionally, choose to reassign tasks and appointment to the new case owner. Click **Change Owner.**

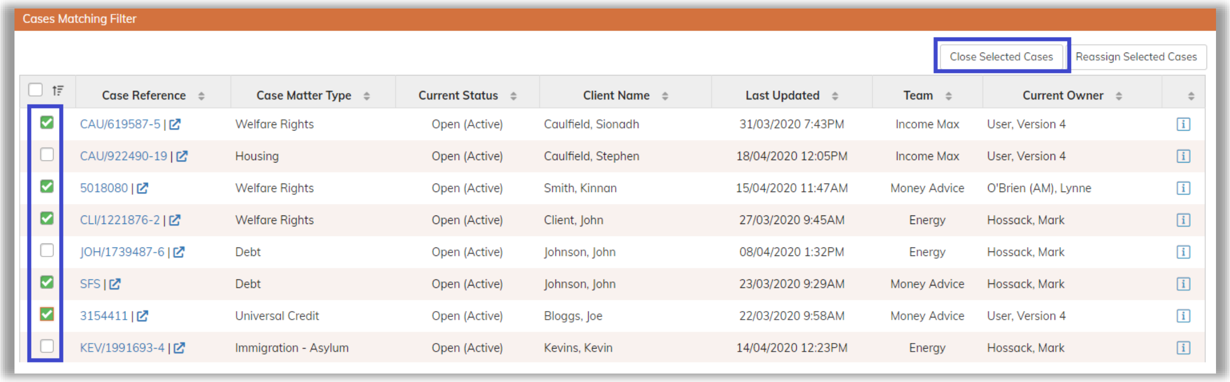


- A message is sent to both the original and the new case owners to inform them of the change.

ⓘ Cases are re-assigned instantly – there is no need to save your changes and you are not asked to confirm them.

Closing a Number of Cases Simultaneously

- Select the cases that you want to close by ticking the boxes on the left of each row.



	Case Reference	Case Matter Type	Current Status	Client Name	Last Updated	Team	Current Owner	
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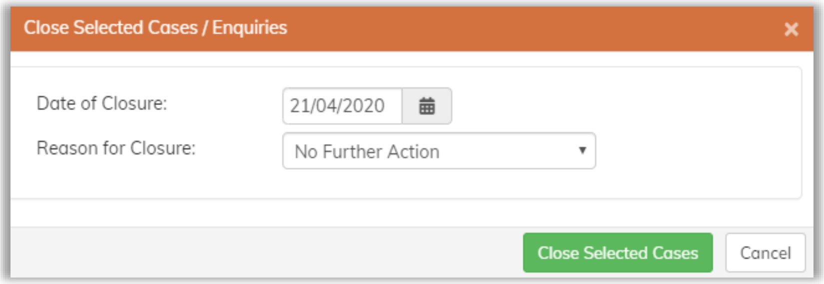
- Click **Close Selected Cases**

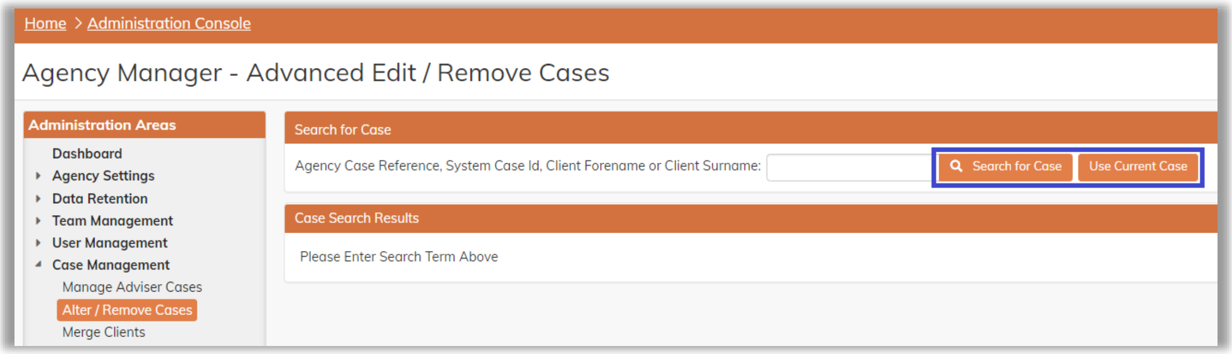


- The **Close Selected Cases/Enquiries** box appears.

- The date of closure defaults to the date of action but this can be manually overridden. Choose the **Reason for Closure** and **Close Selected Cases.**

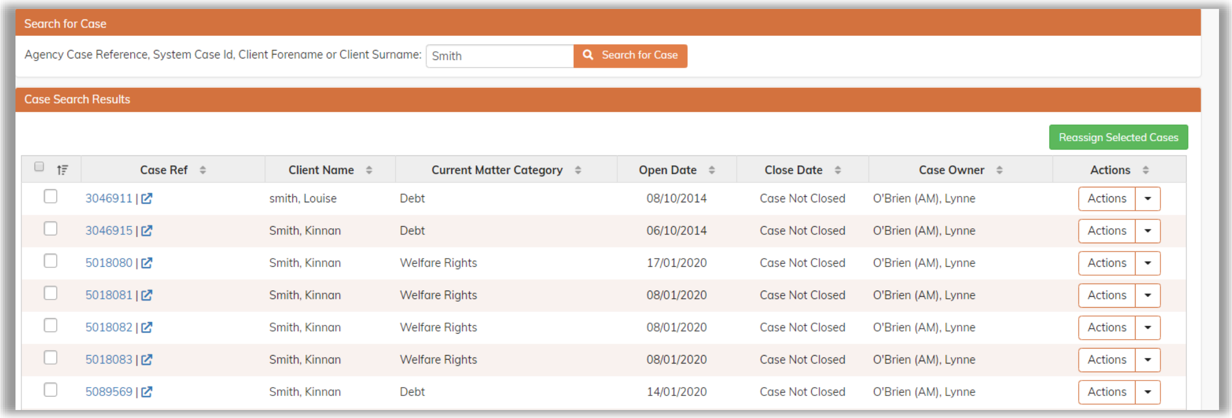
Alter/Remove Cases

You can search for cases you need to amend by entering the agency case reference, system case ID, client forename or surname and select **Search for Case**. Alternatively, have the case you need to amend already loaded and select **Use Current Case**.

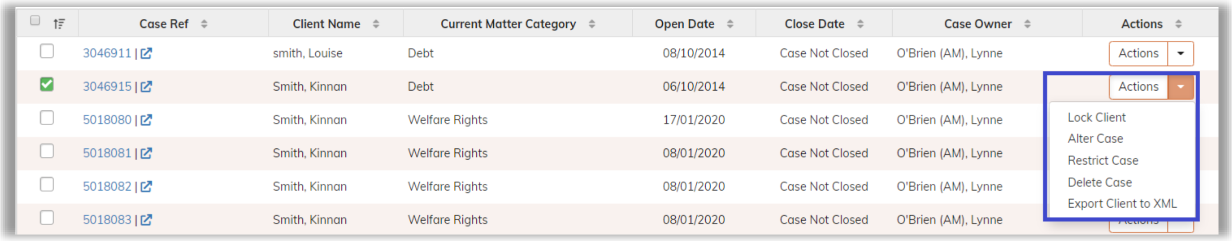


- The list of cases in the example below is all these where the client's surname is Smith.

- Click on the any of the column headings to sort the list by that value.



- Select the case you require to amend and which option from the **Actions** column on the right hand side of the row.



Lock Client

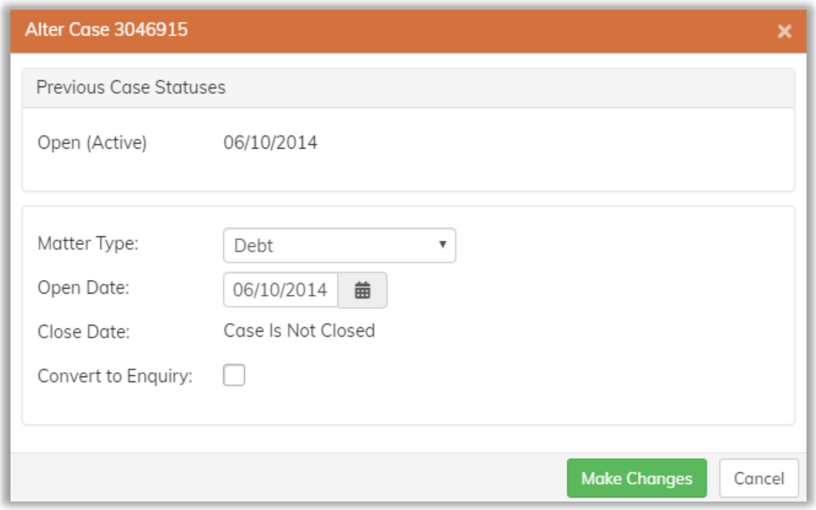
This is an optional feature which can be activated by contacting the Helpdesk.

To lock a client, click the **Lock Client** link in the **Actions** column. This locks the client, preventing any changes being made to the client and the cases belonging to that client. Additionally, no new cases can be created for that client. When a search is made for that client, the results show greyed out. The cases can still be accessed but in a read only format.

Alter Case

This option allows you to:

- Amend the **Matter Type** and the **Open Date** for the case. If you are amending a welfare rights issue, a further dropdown box will show listing your agency's welfare rights issues for you to choose.



- Click **Make Changes** to alter the case. The changes are saved instantly – you are not asked to confirm them.

Restrict Case

This is an optional feature which can be activated by contacting the Helpdesk.

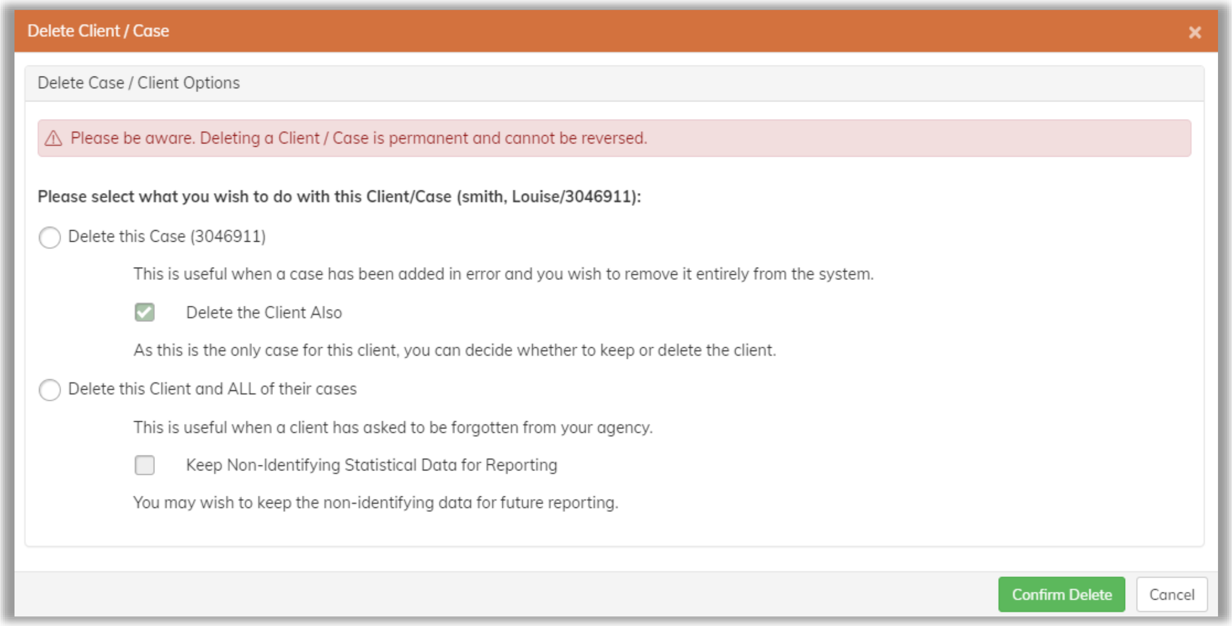
It provides functionality which allows only certain users to access a specific case or cases. This could be in circumstances where the case contains particularly sensitive information.

Delete Clients/Cases

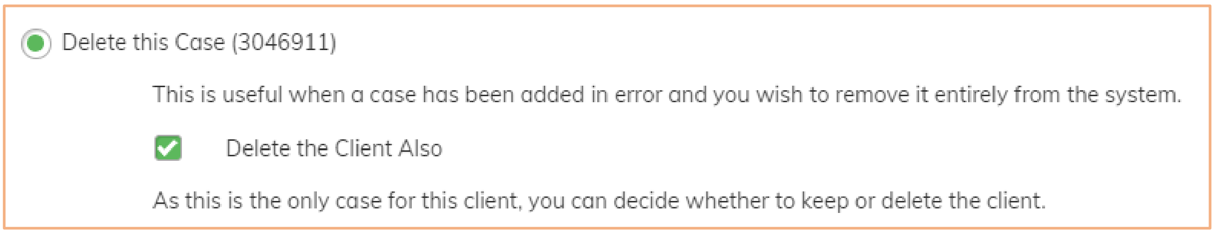
ⓘ Once clients and cases have been deleted, this is a permanent action and cannot be reversed.

Delete a single case from a client with multiple cases

This functionality allows you to delete a single case. This is useful if the case was added in error.



- Select the first radio button in the pop-up box **Delete this Case**. If this is the only case for the client, you will be offered the additional option of deleting the client also. If you wish the keep the client record, they will remain on the system but with no case, untick the **Delete the Client Also** and then click **Confirm Delete.**

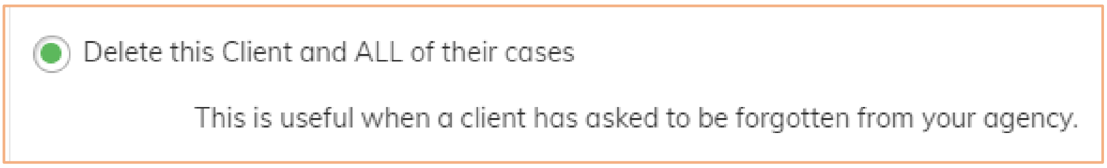


- You will then be asked if you are sure, click 'Yes' and the case will be deleted. If **Delete the Client Also** was ticked, the client will be deleted as well.

Delete a client and all of their cases

This functionality allows you to delete the client and all of their cases from the system. This is useful when the client has asked to be removed / forgotten from your agency.

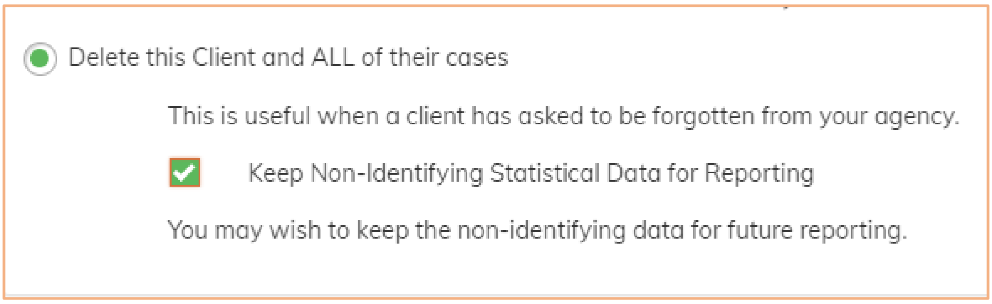
- Select the second radio button in the pop-up box **Delete this Client and ALL of their cases**. Click **Confirm Delete.**
- This will remove all data about the client and all of their cases from the system.



- You will then be asked if you are sure, click 'Yes' and the case will be deleted. If **Delete the Client Also** was ticked, the client will be deleted as well.

Delete a client and all of their cases – retaining statistical information

- This functionality allows you to delete the client and all of their cases from the system. This is useful when the client has asked to be removed / forgotten from your agency. However, you may have done quite a lot of work for the client and do not wish to delete this non-identifying information from the Reporting System.
- In the popup dialog, select **Delete this Client and ALL of their cases**. and tick the 'Keep Non-Identifying Statistical Data for Reporting



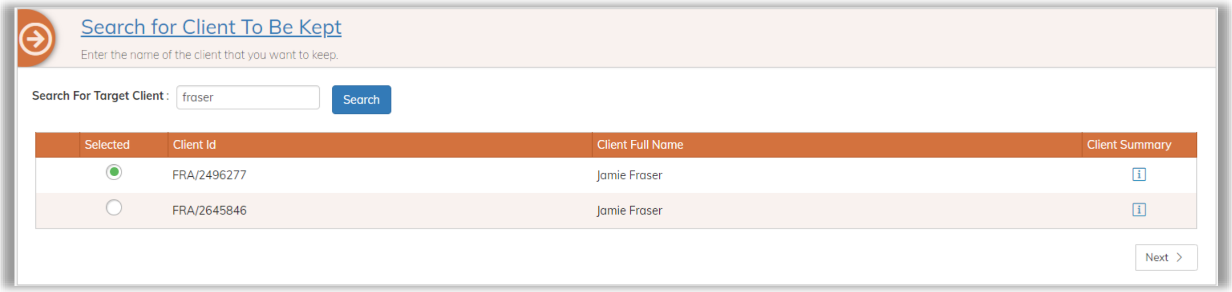
- Click **Confirm Delete.**
- You will then be asked if you are sure, click 'Yes' and the client and case(s) will be deleted.
- This will anonymise the client information, remove all notes and prevent you from accessing the client/cases in the main application. However, all of the non-identifying data (Work Completed, Outcomes etc.) will be retained and can be accessed from the reporting application.

Merge Clients

This functionality allows you to merge multiple duplicate clients into one record.

When you select **Merge Clients**, you will be presented with a page asking you to input firstly, the client you wish to be kept.

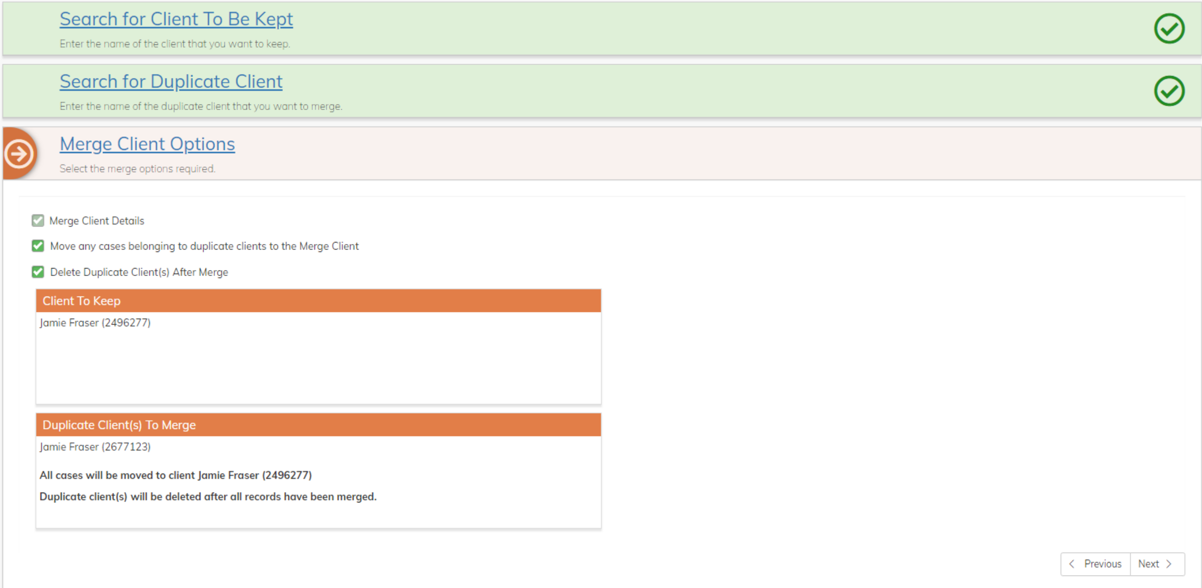
Type in the name of the client you wish to keep and click **Search.** Click the radio button next to the relevant client and click **Next.**



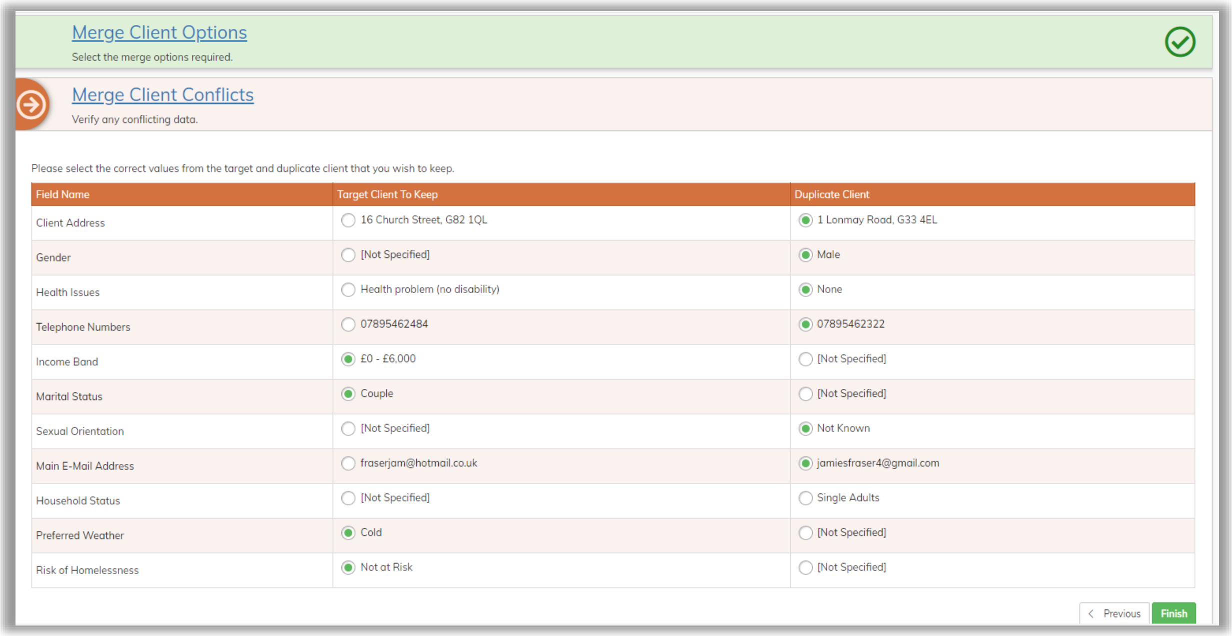
ⓘ To ensure you have the correct client, you can click on the [i] button in the **Client Summary** panel for more expansive information.

Type in the name of the duplicated client and click **Search.** Click the radio button next to the relevant client and click **Next.**

A list of **Merge Client Options** displays the clients that have been selected along with your options.



- **Merge Client Details** compares the client records and returns any conflict.
- **Move any cases belonging to duplicate client to the Merge Client** will move any cases found to the merged client.
- **Delete Duplicate Client(s) After Merge** will delete all duplicate client(s) after client details and cases have been merged.
- When you click **Next,** the system will compare the client records to display any conflicting information. Select the correct values, click **Finish** and the merge will be completed.



Field Name	Target Client To Keep	Duplicate Client
Client Address	16 Church Street, G82 1QL	1 Lonmay Road, G33 4EL
Gender	[Not Specified]	Male
Health Issues	Health problem (no disability)	None
Telephone Numbers	07895462484	07895462322
Income Band	£0 - £6,000	[Not Specified]
Marital Status	Couple	[Not Specified]
Sexual Orientation	[Not Specified]	Not Known
Main E-Mail Address	fraserjam@hotmail.co.uk	jamiesfraser4@gmail.com
Household Status	[Not Specified]	Single Adults
Preferred Weather	Cold	[Not Specified]
Risk of Homelessness	Not at Risk	[Not Specified]