VAPK Case Management

Product Kit by Visual Antidote

User Documentation

Contents

Introduction

The Case Management Product Kit is designed for any organization which needs to track cases, such as investigations, grievances or complaints for regulatory bodies or unions.

Like all Visual Antidote Product Kits, Case Management is built using standard iMIS Components (Form Builder, IQAs, Process Automation and RiSE) and are fully iMIS Cloud ready.

This documentation is a step by step guide on how to use the Case Management system. Your configuration may vary slightly depending on how your system was set up.

For a 5 minute demonstration, view this video here:

https://www.visualantidote.com/Products/Form-Builder-Product-Kits/Case-Management

Dashboard

The Dashboard page gives you a high level overview of all of the cases in the system.

Metrics

The tiles across the top show counts of all cases in the system and at various stages. The pie chart and bar chart show the number of cases by type and number of cases by month (by date submitted).

Alerts

Along the right hand side alerts will display if there are any tasks past their due date. Click on any alert to go to the case detail page of that case

Case Listing

The main section of the page at the bottom shows an iMIS IQA of the cases in the system by stage. Click on the "**View**" button to access the detail page of any specific case. In order to conduct a more detailed search, use the "Case Search" feature in the Case Management menu.
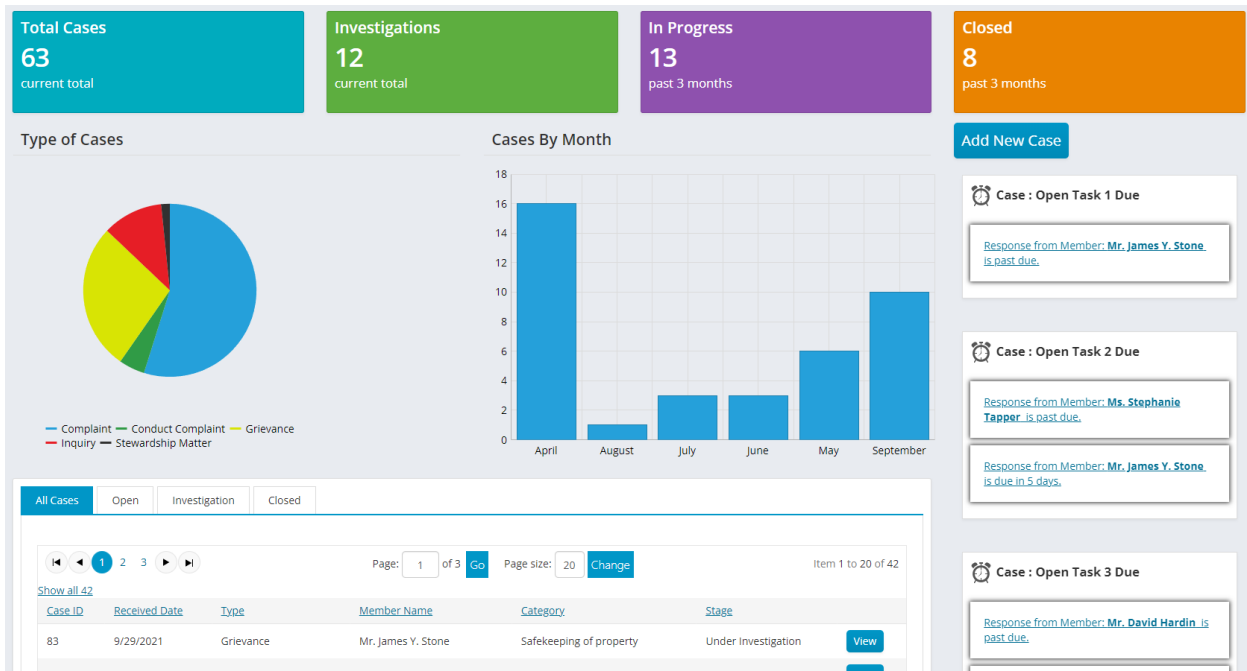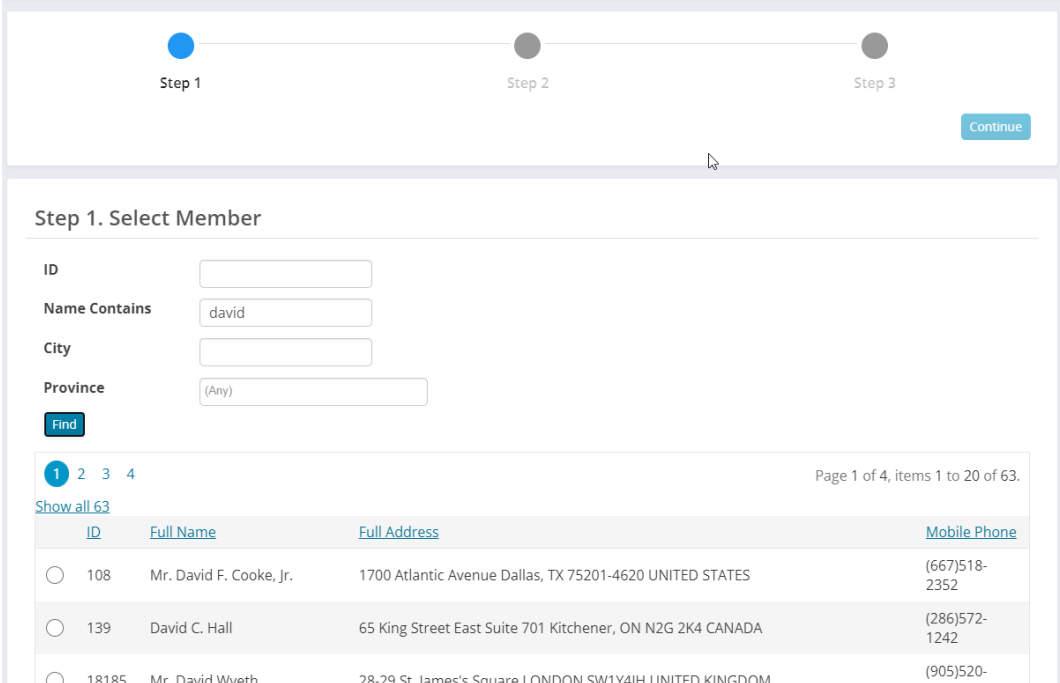
Create a Case

This section describes how to create a new case, step by step.

In order to create a new case from the iMIS Staff site, click on the "**Add New Case**" button in the Case Management menu, or click on the "**Add New Case**" button from the Case management Dashboard. See screenshots below.Step 1

Step 1

After clicking "Add New Case" you will see a search page where you can look up a member. This will be the member the case is attached to. For example this can be a member who is filing a complaint or a member who a complaint is filed against.

Enter search terms and click "Find". Then select the member by clicking the circle to the left of their name. Then click "Continue" at the top right of the page to progress to the next step.
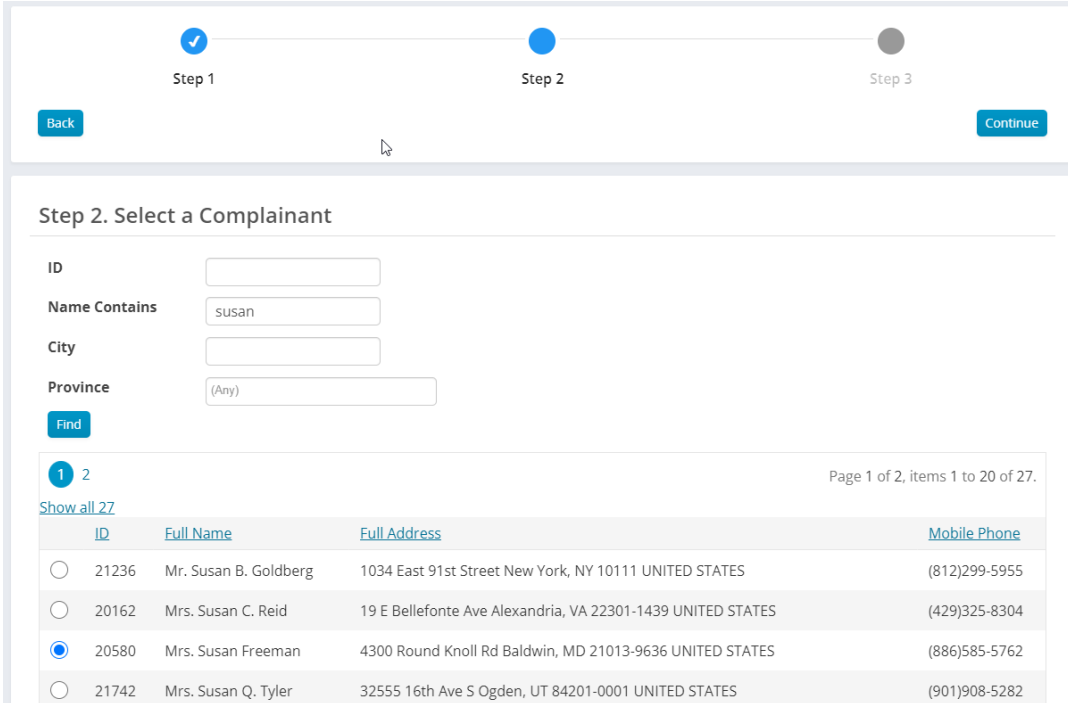
Create Case Step 1

Step 2

On this step you will select the complainant for the case. Select the complainant by entering search terms and clicking "Find". Then select the complainant by clicking the circle to the left of their name. Then click "Continue" at the top right of the page to progress to the next step.
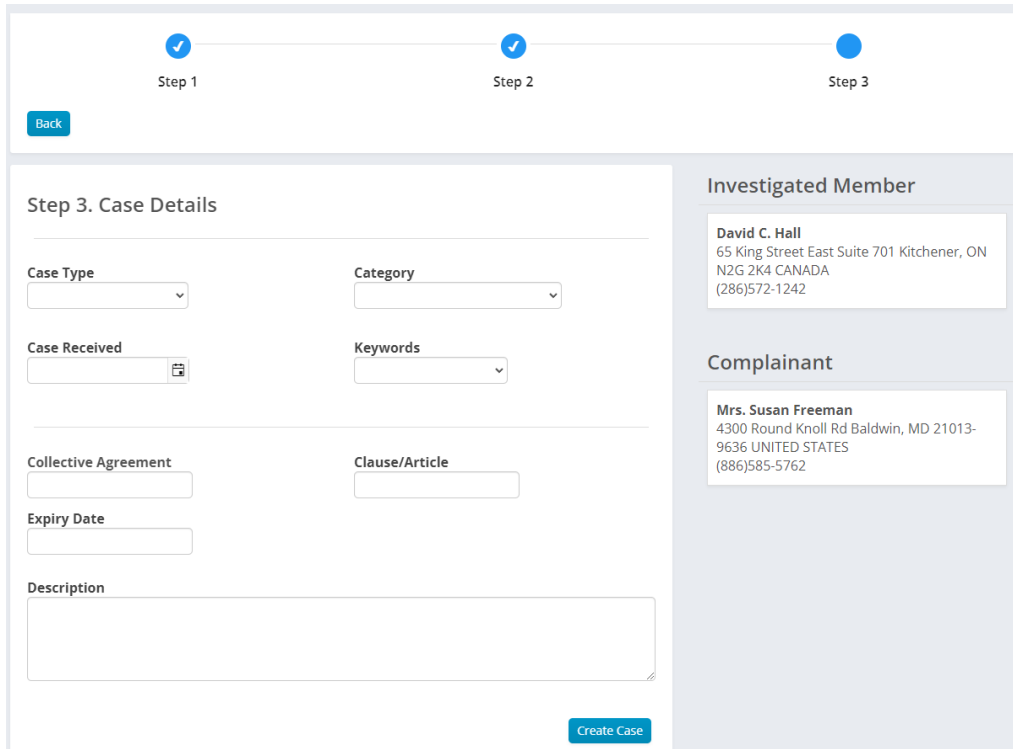
Create Case Step 2

Step 3

The final step of creating a case is to fill in the case details. This page may vary depending on your configuration. The selected member and complainant will show up in the right hand side. On the left side of the page is a form to enter in the details of the case

Make sure to select the case type and enter the date of the case. Fill in the rest of the form fields as needed.

Click "**Create Case**" to create your case with the selected parties and case details. This process will take up to 30 seconds as any predefined tasks are added to your case. After your case is created you will land on the **Case Details** page.

Create Case Step 3

Case Details

The Case Details page is the main page to manage a case and all of its components. From here you can access the following items:

- Member, Complainant and Participants
- Case Details
- Emails
- Case Activities
- Case Tasks
- Documents
- Case Alerts

Case Detail Page

Case Participants

Case Participants are additional people involved in the case that are not the main member or complainant. To add a new participant click the "Add" button and then select a person from the IQA. Depending on our configuration, the Add Participan IQA may also have search fields to search for the participant in your iMIS database as well as a Participant Type drop down.

To remove an existing participant click on the red X icon.

Participants Panel in Case Detail Page
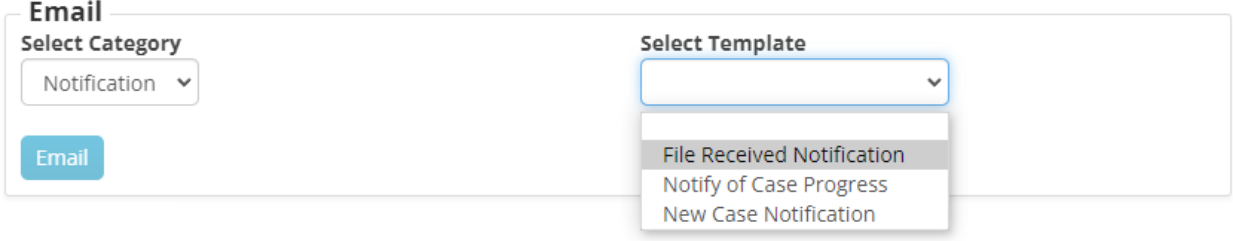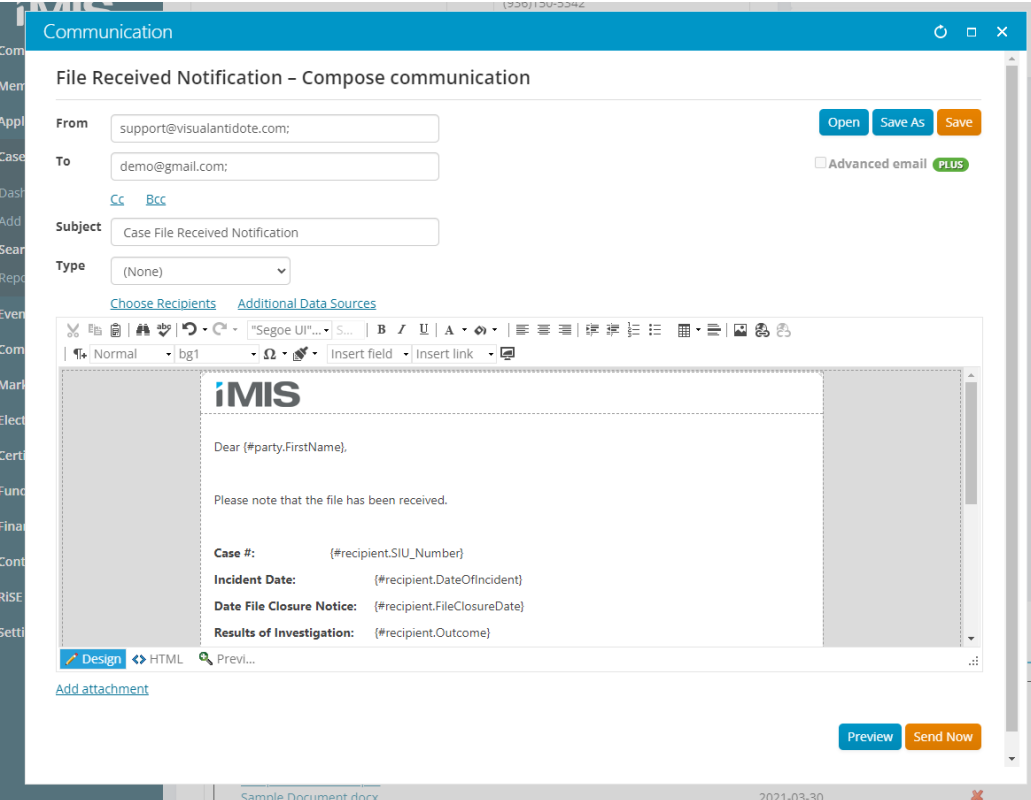
Add Participant Pop Up

Emails

Case Management integrates with iMIS Communication templates to send out Case specific emails with dynamically populate case data. Select a Category, then select a template and click "Email". The iMIS email editor will pop up on the page

Case Activities

Activities allow you to track milestone events within a case. These are displayed in the top right corner of the Case Detail page. There are two types of activities: System activities and User activities. Staff users add a User activity at any time, and edit or delete any existing user activities. Activities consist of the following fields:

- Title
- Date
- Type
- Note

A System activity is created automatically based on a system event. When the case status changes, for example from open to under investigation, a system activity will be automatically created. System activities can be edited, and notes can be added to them, but they cannot be deleted.

Case Activities

Title	Type	Date	
1st call	01PHONECALL	2/24/2021	✖
Under Investigation	System	2/24/2021	
2nd Call	01PHONECALL	2/18/2021	✖
1st Home Visit	03Home	3/10/2021	✖
2nd Home Visit	03Home	3/2/2021	✖

Add Activity

Case Activity List

Create Activity

To create an activity, click on "**Add Activity**". A form will pop up for you to fill in. Select the type and date of the activity, fill in a title and add a note. You can go back at any time to edit these fields or delete the activity.

Add/ Edit form of an Activity

Activity Types

The list of Activity Types in the drop down can be configured in the iMIS Gen Table:
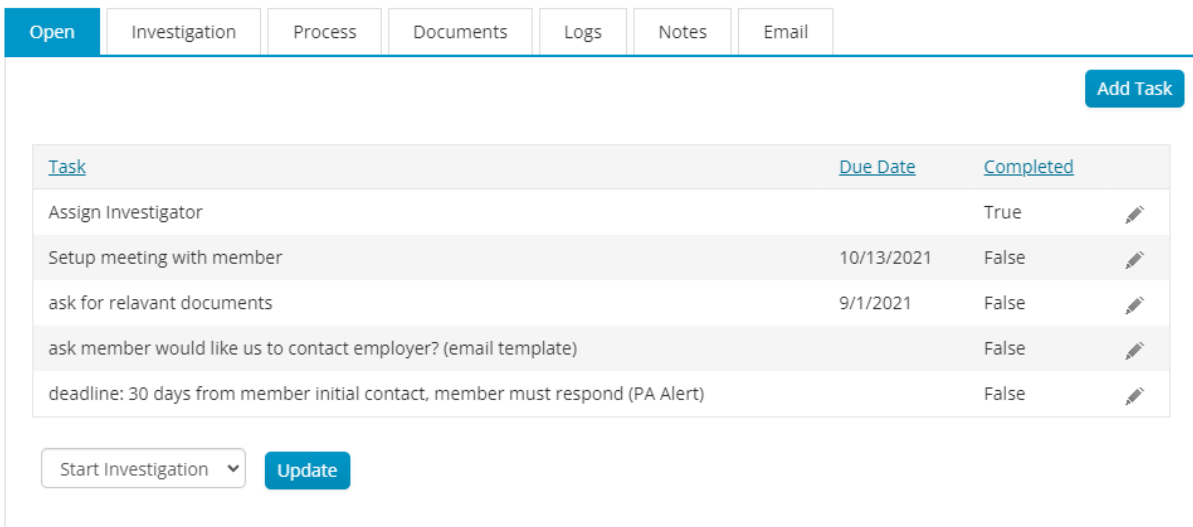
VAPK_CASE_ACTIVITY_TYPE

Case Tasks

Tasks are shown at the bottom of the Case Details page. Depending on your configuration you may have predefined tasks already attached to your case. Tasks are used to track the different tasks of a case, at different stages of the case, and can include a due date of when the task should be completed. Tasks consist of the following fields:

- Task Name
- Note
- Due Date
- Date Completed
- Is Completed checkbox

Tasks are divided into three categories:

- Open
- Investivatation
- Process

Case Tasks Panel

Update Task

To update a task, and mark it as completed, click on the edit pencil icon. The Task form will pop up. enter the completed date and check off the "Is Completed" checkbox. You can also add a note to the task in the notes field.

Create Task

To create a task, click on "**Add Task**" found at the top right of the task panel. A form will pop up for you to fill in. Select a due date of the task, and add a note describing the task. You can go back at any time to edit these fields by clicking the edit icon.

Add/ Edit form of a Task

Documents
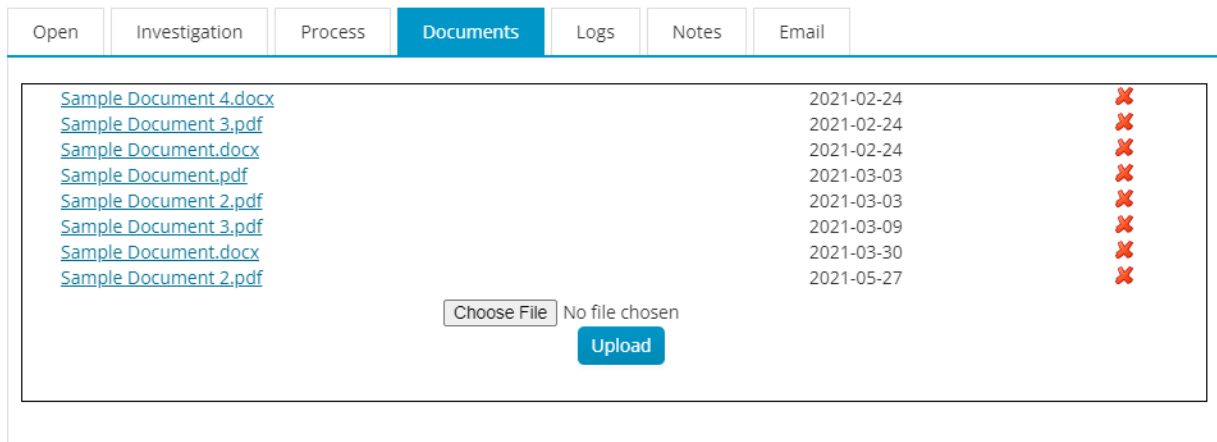
The Documents tab is where you can manage all of the documents of a Case. To download a document click on the name of the document. To upload a document click on "Choose File", select the file from your computer and click the upload button. To delete a document click on the red X icon.

Open	Investigation	Process	**Documents**	Logs	Notes	Email

Sample Document 4.docx	2021-02-24	✖
Sample Document 3.pdf	2021-02-24	✖
Sample Document.docx	2021-02-24	✖
Sample Document.pdf	2021-03-03	✖
Sample Document 2.pdf	2021-03-03	✖
Sample Document 3.pdf	2021-03-09	✖
Sample Document.docx	2021-03-30	✖
Sample Document 2.pdf	2021-05-27	✖

Choose File | No file chosen

Upload

Notes

Notes are shown at the bottom of the Case Details page. Notes are an area where you can leave detailed notes pertaining to the case. For example if you have a call with the member or counsel, you can leave the notes of your meeting in this section. The Notes section is meant for longer, more detailed text then would be put in an Activity or a Task.

Notes consist of the following fields:

- Stage (dropdown)
- Date
- Note

Create Note

To create a note, click on "**Add Note**". A form will pop up for you to fill in. Select the stage and date of the note, and fill in the Note area with your detailed note. You can go back at any time to edit these fields or delete the note.

Add/ Edit form of a Note

Logs

The logs section shows the detailed logging of changes made to the case, who made them, and the date and time they were made. iMIS Logging records when all fields in iMIS are updated. This is very useful for an audit trail. The logs tab shows the iMIS log records related to the specific case.

| Open | Investigation | Process | Documents | **Logs** | Notes | Email |

Sub Type	Log Type	Date Time	Log Text
ADD	CHANGE	2021-02-24T22:24:58.06	VAPK_CASE_CASES.ComplainantID (33): -> 138
CHANGE	CHANGE	2021-02-24T22:24:58.063	VAPK_CASE_CASES.Type (33): -> 01Grievance
CHANGE	CHANGE	2021-02-24T22:24:58.07	VAPK_CASE_CASES.Classification (33): -> 00
CHANGE	CHANGE	2021-02-24T22:24:58.073	VAPK_CASE_CASES.Received_Date (33): -> 02/24/2021
CHANGE	CHANGE	2021-02-24T22:24:58.08	VAPK_CASE_CASES.SubClassification (33): -> 00-00
CHANGE	CHANGE	2021-03-03T11:59:23.28	VAPK_CASE_CASES.Outcome (33): 01Dismissed ->
CHANGE	CHANGE	2021-03-03T11:59:29.203	VAPK_CASE_CASES.Status (33): 15Closed -> 05UnderInvestigation
CHANGE	CHANGE	2021-03-03T15:38:23.83	VAPK_CASE_CASES.Status (33): 05UnderInvestigation -> 15Closed
CHANGE	CHANGE	2021-03-03T15:38:23.833	VAPK_CASE_CASES.Outcome (33): -> 05Appeal
CHANGE	CHANGE	2021-03-09T15:11:26.693	VAPK_CASE_CASES.Status (33): 15Closed -> 05UnderInvestigation
CHANGE	CHANGE	2021-03-09T15:11:26.703	VAPK_CASE_CASES.Outcome (33): 05Appeal ->