

# VAPK Case Management

*Product Kit by Visual Antidote*

**User Documentation**

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## 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

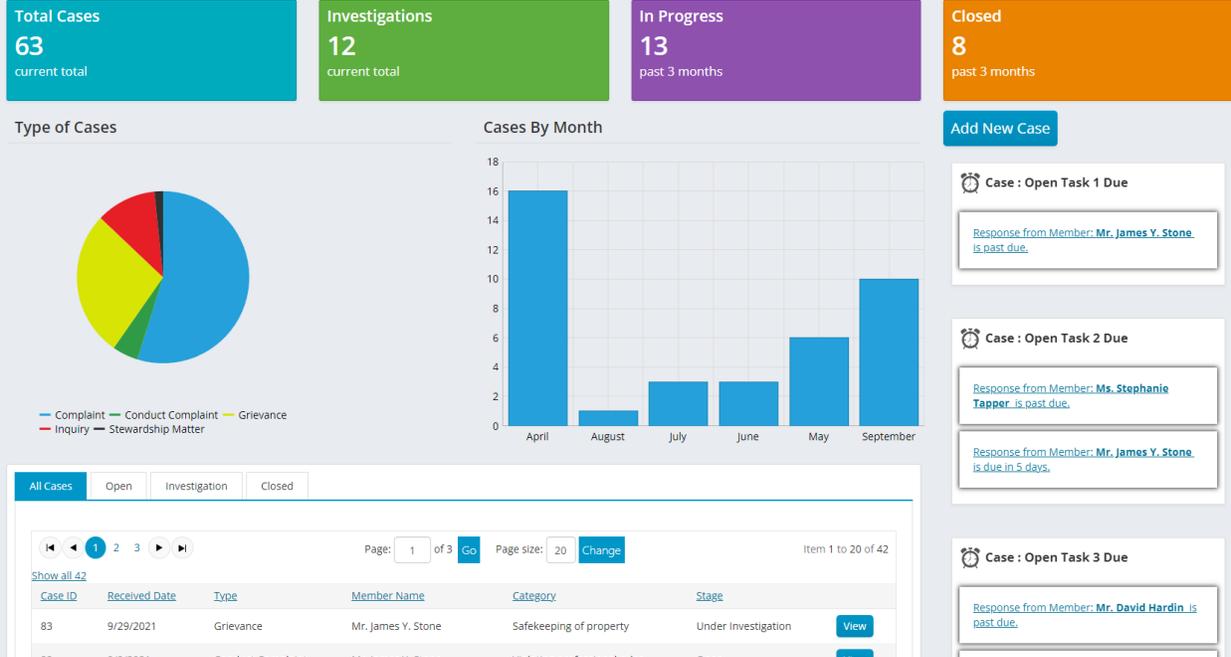
The tiles across the top show counts of all cases in the system and at various stages. The pie chart and bar chart show the number of cases by type and number of cases by month (by date submitted).

## 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.



**Total Cases**  
63  
current total

**Investigations**  
12  
current total

**In Progress**  
13  
past 3 months

**Closed**  
8  
past 3 months

**Type of Cases**

**Cases By Month**

**Add New Case**

**Case : Open Task 1 Due**  
Response from Member: [Mr. James Y. Stone](#) is past due.

**Case : Open Task 2 Due**  
Response from Member: [Ms. Stephanie Tapper](#) is past due.  
Response from Member: [Mr. James Y. Stone](#) is due in 5 days.

**Case : Open Task 3 Due**  
Response from Member: [Mr. David Hardin](#) is past due.

**All Cases** | Open | Investigation | Closed

Page: 1 of 3 **Go** | Page size: 20 **Change** | Item 1 to 20 of 42

Show all 42

Case ID	Received Date	Type	Member Name	Category	Stage	
83	9/29/2021	Grievance	Mr. James Y. Stone	Safekeeping of property	Under Investigation	<a href="#">View</a>
87	9/29/2021	Conduct Complaint	Mr. James Y. Stone	Violating professional rules	Open	<a href="#">View</a>

## Create a Case

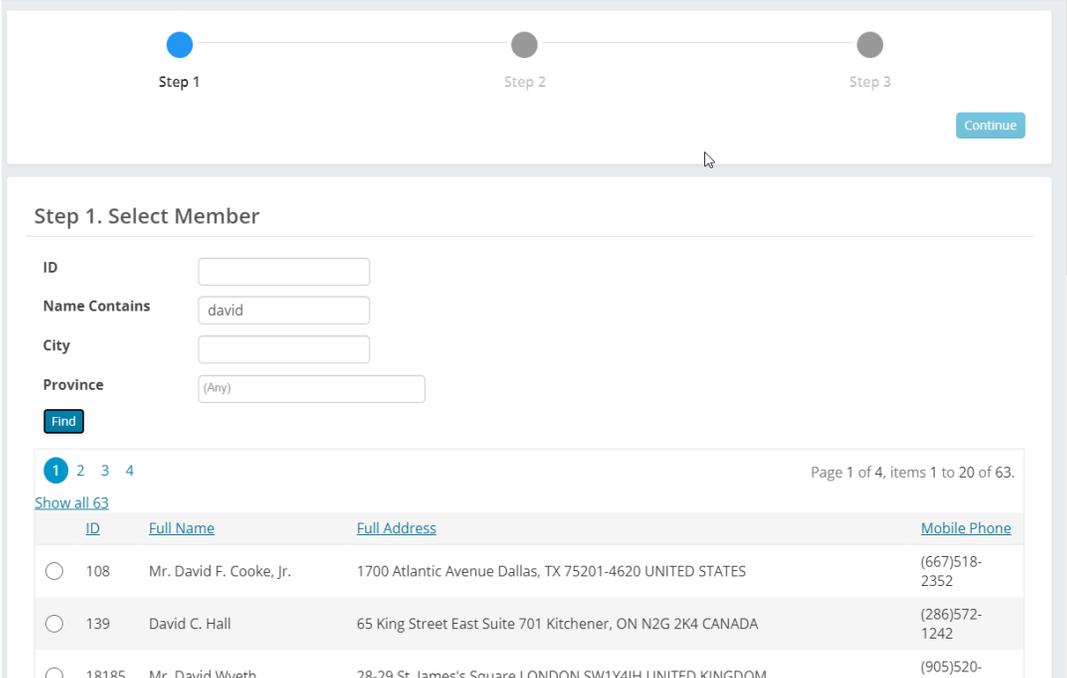
This section describes how to create a new case, step by step.

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.



Step 1. Select Member

ID

Name Contains

City

Province

1 2 3 4 Page 1 of 4, items 1 to 20 of 63.

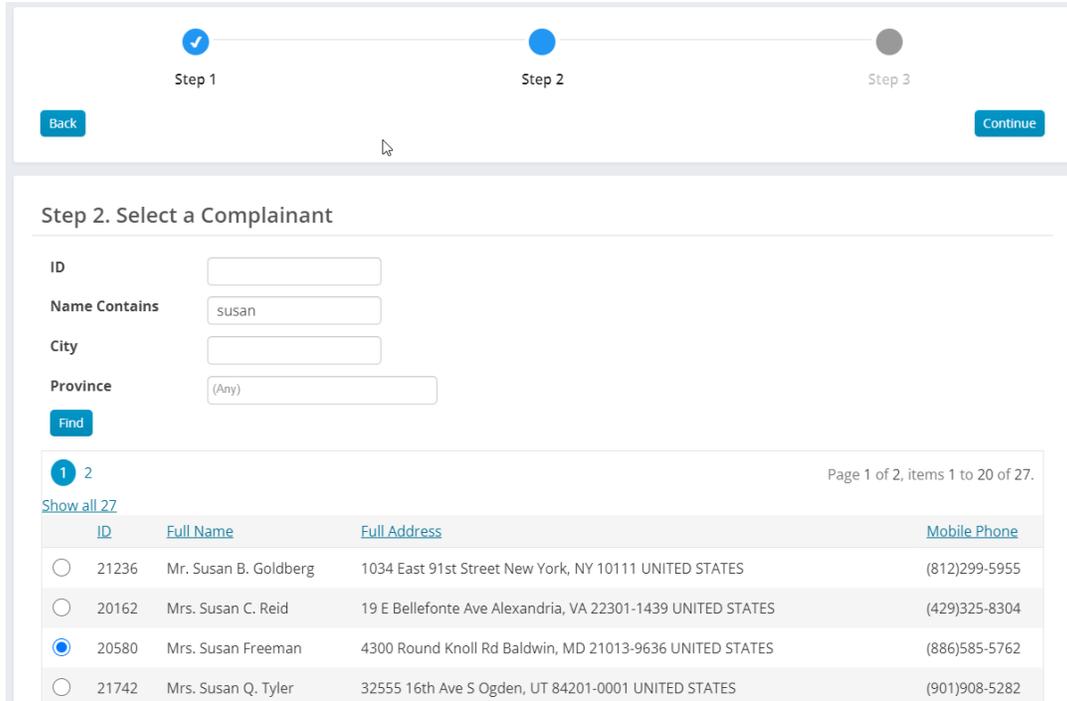
[Show all 63](#)

ID	Full Name	Full Address	Mobile Phone
<input type="radio"/> 108	Mr. David F. Cooke, Jr.	1700 Atlantic Avenue Dallas, TX 75201-4620 UNITED STATES	(667)518-2352
<input type="radio"/> 139	David C. Hall	65 King Street East Suite 701 Kitchener, ON N2G 2K4 CANADA	(286)572-1242
<input type="radio"/> 18185	Mr. David Wweth	28-29 St. James's Square LONDON SW1Y4IH UNITED KINGDOM	(905)520- ----

### 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.



The screenshot shows a three-step progress bar at the top. Step 1 is completed (checkmark), Step 2 is active (blue circle), and Step 3 is pending (grey circle). Below the progress bar are 'Back' and 'Continue' buttons. The main content area is titled 'Step 2. Select a Complainant'. It contains search filters: 'ID' (empty), 'Name Contains' (susan), 'City' (empty), and 'Province' (Any). A 'Find' button is below the filters. Below the filters is a table with 27 items, showing the first 5. The table has columns for ID, Full Name, Full Address, and Mobile Phone. The third row is selected with a blue radio button.

ID	Full Name	Full Address	Mobile Phone
<input type="radio"/> 21236	Mr. Susan B. Goldberg	1034 East 91st Street New York, NY 10111 UNITED STATES	(812)299-5955
<input type="radio"/> 20162	Mrs. Susan C. Reid	19 E Bellefonte Ave Alexandria, VA 22301-1439 UNITED STATES	(429)325-8304
<input checked="" type="radio"/> 20580	Mrs. Susan Freeman	4300 Round Knoll Rd Baldwin, MD 21013-9636 UNITED STATES	(886)585-5762
<input type="radio"/> 21742	Mrs. Susan Q. Tyler	32555 16th Ave S Ogden, UT 84201-0001 UNITED STATES	(901)908-5282

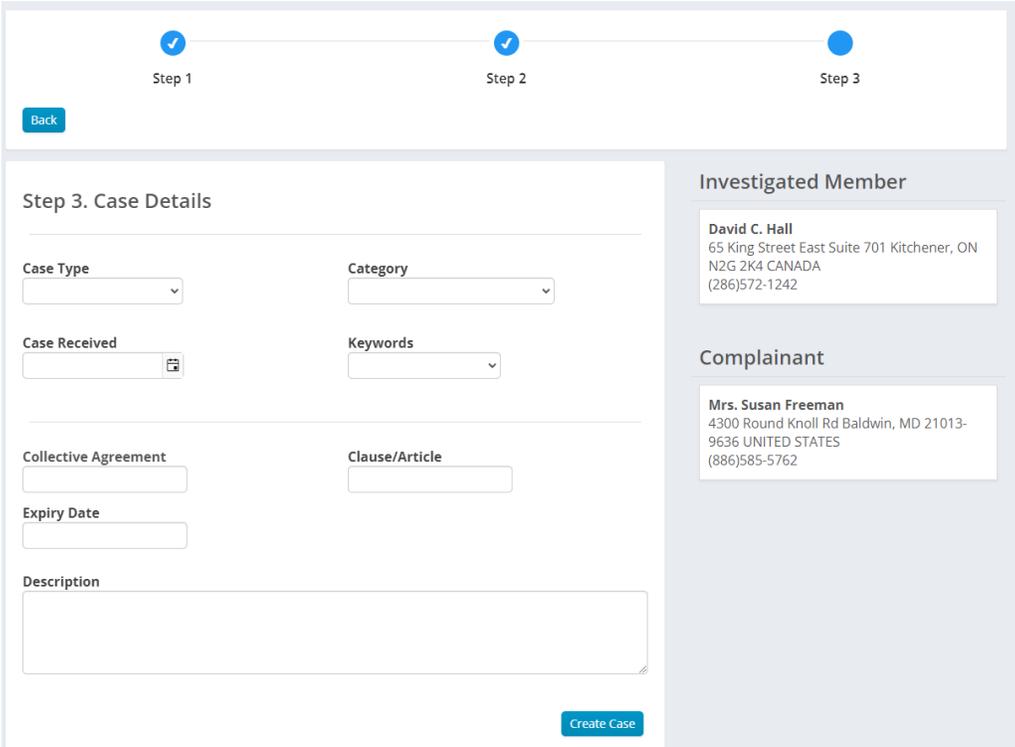
### Create Case Step 2

## 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.



Step 1 ✓ Step 2 ✓ Step 3 ●

Back

### Step 3. Case Details

Case Type  Category

Case Received  Keywords

Collective Agreement  Clause/Article

Expiry Date

Description

Create Case

#### Investigated Member

**David C. Hall**  
65 King Street East Suite 701 Kitchener, ON  
N2G 2K4 CANADA  
(286)572-1242

#### Complainant

**Mrs. Susan Freeman**  
4300 Round Knoll Rd Baldwin, MD 21013-  
9636 UNITED STATES  
(886)585-5762

### 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

Case ID : 83

**Status : Under Investigation**

Case Received  
2021-09-29

#### Participants

[Jai Pandit](#) ✖

[Mr. Brian Erdogan](#) ✖

[Ms. Carol A. Hamilton](#) ✖

[Add](#)

#### Member

[Mr. James Y. Stone](#)  
Versaton Canada  
220 Burrard Street Suite 100 Vancouver, BC V6C 0C4 CANADA

#### Complainant

[David C. Hall](#)  
65 King Street East Suite 701 Kitchener, ON N2G 2K4 CANADA  
(286)572-1242  
(519) 743-3307

**Case Type**  
Grievance

**Status**  
Under Investigation

**Outcome**  
[Dropdown]

[Update](#)

**Classification Group**  
Safekeeping of property

**Classification Level**  
Property

**Staff Assigned**  
Brian Erdogan - Investigator

**Email**

Select Category  
[Dropdown]

Select Template  
[Dropdown]

[Email](#)

Open

Investigation

Process

Documents

Logs

Notes

Email

Task	Due Date	Completed
Secure evidence		False
Determine articles		False

### Case Activities

Title	Type	Date	
<a href="#">Emailed Member</a>	02Email	9/29/2021	✖
<a href="#">Under Investigation</a>	System	9/28/2021	

[Add Activity](#)

**Open Task 2 Due**

[Response from Member: Mr. James Y. Stone is due in 5 days.](#)

**Case : Open Task 3 Due**

[Response from Member: Mr. James Y. Stone is past due.](#)

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 Participant 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

<a href="#">Jai Pandit</a>	✘
<a href="#">Mr. Brian Erdogan</a>	✘
<a href="#">Ms. Carol A. Hamilton</a>	✘

Add

### Participants Panel in Case Detail Page

Add Participant

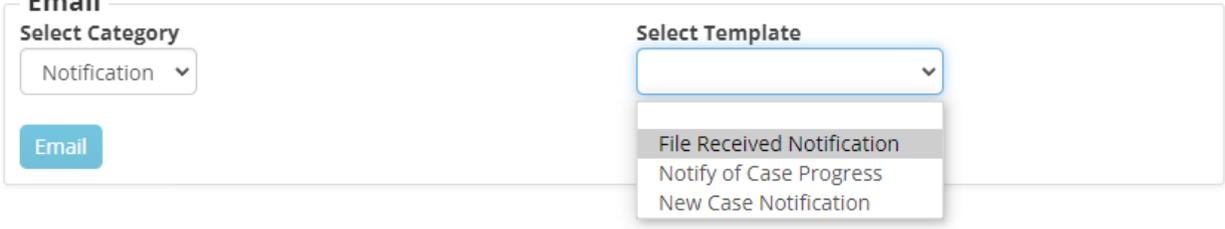
	ID	Name
<input type="radio"/>	107	Paula Caller - Investigator
<input type="radio"/>	108	Mr. David F. Cooke, Jr.
<input checked="" type="radio"/>	111	Richard Harris - Investigator
<input type="radio"/>	23098	Benton Holley - Counsel
<input type="radio"/>	23151	Al Soria - Counsel

Add

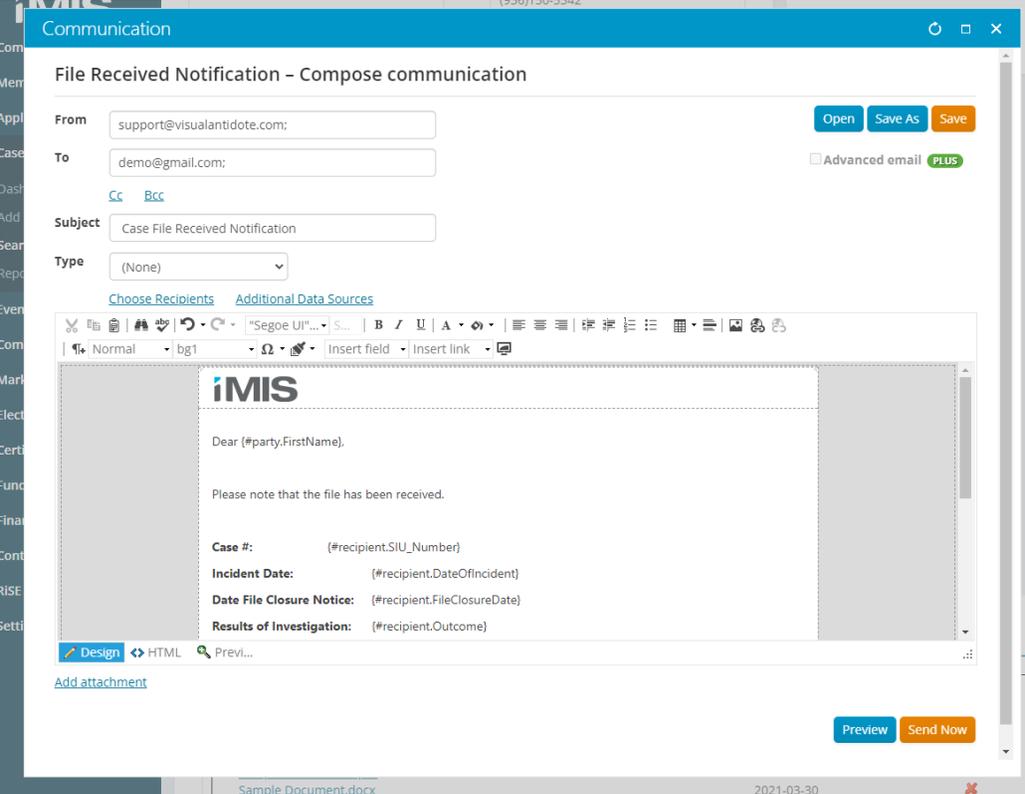
### Add Participant Pop Up

## 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



The screenshot shows a form titled "Email" with two dropdown menus. The first dropdown, "Select Category", has "Notification" selected. The second dropdown, "Select Template", has a list of options: "File Received Notification", "Notify of Case Progress", and "New Case Notification". A blue "Email" button is located below the "Select Category" dropdown.



The screenshot shows the "iMIS Communication" editor window titled "File Received Notification - Compose communication". The form includes fields for "From" (support@visualantidote.com), "To" (demo@gmail.com), "Subject" (Case File Received Notification), and "Type" (None). There are buttons for "Open", "Save As", and "Save", and a checkbox for "Advanced email PLUS". Below the form is a rich text editor with a toolbar and a preview area. The preview area shows the email content: "Dear (#party.FirstName), Please note that the file has been received. Case #: (#recipient.SIU\_Number) Incident Date: (#recipient.DateOfIncident) Date File Closure Notice: (#recipient.FileClosureDate) Results of Investigation: (#recipient.Outcome)". At the bottom, there are buttons for "Design", "HTML", "Preview", and "Send Now", and a link for "Add attachment".

## 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

<a href="#">Title</a>	<a href="#">Type</a>	<a href="#">Date</a>	
<a href="#">1st call</a>	01PHONECALL	2/24/2021	✘
<a href="#">Under Investigation</a>	System	2/24/2021	
<a href="#">2nd Call</a>	01PHONECALL	2/18/2021	✘
<a href="#">1st Home Visit</a>	03Home	3/10/2021	✘
<a href="#">2nd Home Visit</a>	03Home	3/2/2021	✘

Add Activity

#### Case Activity List



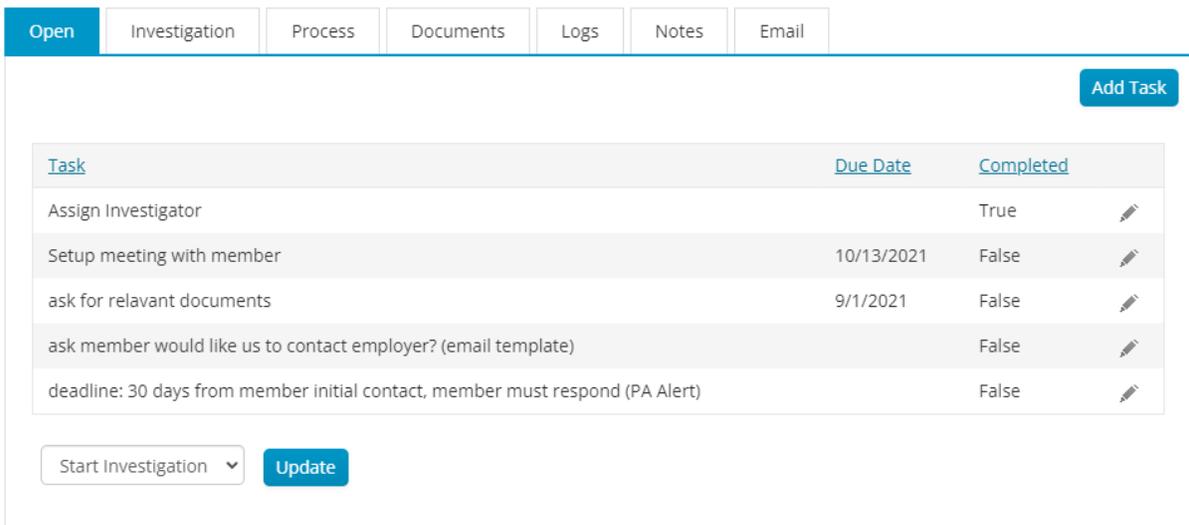
## Case Tasks

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
- Investigation
- Process



The screenshot shows the 'Case Tasks Panel' interface. At the top, there are tabs for 'Open', 'Investigation', 'Process', 'Documents', 'Logs', 'Notes', and 'Email'. The 'Open' tab is selected. In the top right corner, there is an 'Add Task' button. Below this is a table with columns for 'Task', 'Due Date', and 'Completed'. The table contains five rows of tasks. At the bottom of the panel, there is a dropdown menu set to 'Start Investigation' and an 'Update' button.

<u>Task</u>	<u>Due Date</u>	<u>Completed</u>
Assign Investigator		True 
Setup meeting with member	10/13/2021	False 
ask for relevant documents	9/1/2021	False 
ask member would like us to contact employer? (email template)		False 
deadline: 30 days from member initial contact, member must respond (PA Alert)		False 

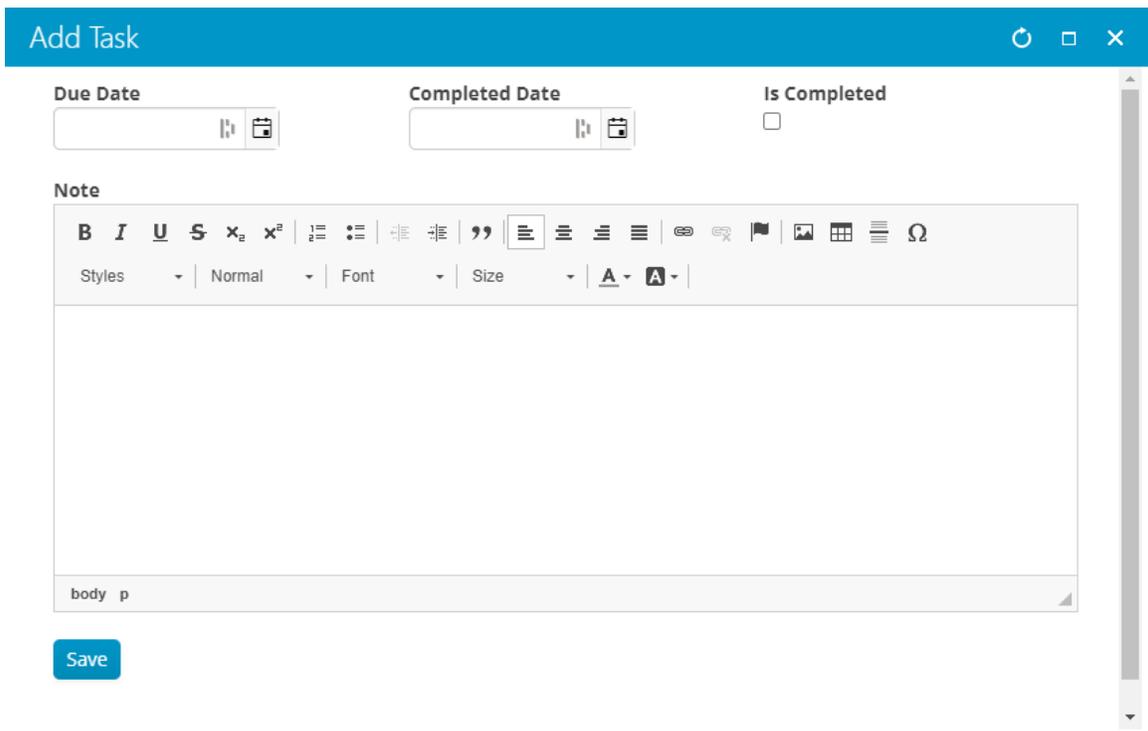
### Case Tasks Panel

## 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.

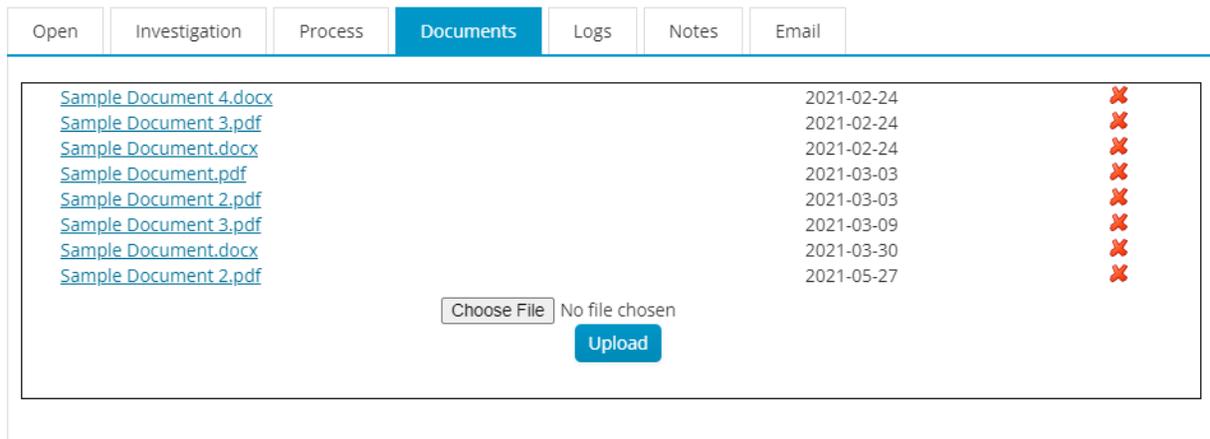


The screenshot shows a modal window titled "Add Task". At the top, there are three input fields: "Due Date", "Completed Date", and "Is Completed". The "Is Completed" field is a checkbox. Below these is a "Note" field with a rich text editor toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, indent, outdent, quote, link, unlink, insert image, insert table, and insert link. Below the toolbar are dropdown menus for "Styles" (set to "Normal"), "Font", and "Size", followed by text color and background color pickers. A "Save" button is located at the bottom left of the form.

**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.



The screenshot shows the 'Documents' tab selected in a navigation bar. Below the navigation bar is a table of documents. At the bottom of the table area is a file upload section with a 'Choose File' button, the text 'No file chosen', and an 'Upload' button.

Document Name	Date	Action
<a href="#">Sample Document 4.docx</a>	2021-02-24	X
<a href="#">Sample Document 3.pdf</a>	2021-02-24	X
<a href="#">Sample Document.docx</a>	2021-02-24	X
<a href="#">Sample Document.pdf</a>	2021-03-03	X
<a href="#">Sample Document 2.pdf</a>	2021-03-03	X
<a href="#">Sample Document 3.pdf</a>	2021-03-09	X
<a href="#">Sample Document.docx</a>	2021-03-30	X
<a href="#">Sample Document 2.pdf</a>	2021-05-27	X

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

Open
Investigation
Process
Documents
Logs
Notes
Email

Add Note

Stage	Date	Case Note	Edit	Remove
In Progress	5/6/2021	<p>&gt;Lorem ipsum dolor sit amet, consectetur adipiscing elit. In congue urna non neque feugiat, quis blandit lacus venenatis. Pellentesque eu nisi id turpis suscipit feugiat. Curabitur molestie justo vel euismod placerat. Praesent non tincidunt nulla. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse fermentum,</p> <p>velit nec posuere consequat, orci diam consectetur mauris, lobortis vestibulum neque velit sed arcu. Pellentesque vitae magna sit amet ex elementum hendrerit nec sed odio. Nulla eleifend, elit vitae vehicula dictum, arcu diam scelerisque urna, quis maximus felis nulla at lorem. Cras velit mauris, finibus quis nibh id, vehicula aliquam magna. Phasellus dui sapien, porttitor non euismod at, blandit ac risus. Pellentesque bibendum, diam dictum vestibulum vulputate, lacus libero suscipit turpis, vitae imperdiet velit elit id urna. Maecenas consectetur finibus rhoncus. Donec rhoncus velit at faucibus tempor. Suspendisse potenti.</p>	✎	✖
Open	5/3/2021	<p>&gt;Lorem ipsum dolor sit amet, consectetur adipiscing elit. In congue urna non neque feugiat, quis blandit lacus venenatis. Pellentesque eu nisi id turpis suscipit feugiat. Curabitur molestie justo vel euismod placerat. Praesent non tincidunt nulla. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse fermentum,</p> <p>velit nec posuere consequat, orci diam consectetur mauris, lobortis vestibulum neque velit sed arcu. Pellentesque vitae magna sit amet ex elementum hendrerit nec sed odio. Nulla eleifend, elit vitae vehicula dictum, arcu diam scelerisque urna, quis maximus felis nulla at lorem. Cras velit mauris, finibus quis nibh id, vehicula aliquam magna. Phasellus dui sapien, porttitor non euismod at, blandit ac risus. Pellentesque bibendum, diam dictum vestibulum vulputate, lacus libero suscipit turpis, vitae imperdiet velit elit id urna. Maecenas consectetur finibus rhoncus. Donec rhoncus velit at faucibus tempor. Suspendisse potenti.</p>	✎	✖

### 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.



## 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.

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 ->