

VAPK Case Management

Product Kit by Visual Antidote

User Documentation

Contents

Contents	2
Introduction	2
Dashboard	4
Create a Case	5
Step 1	5
Step 2	6
Step 3	7
Case Details	8
Case Participants	9
Emails	10
Case Activities	11
Create Activity	12
Activity Types	12
Case Tasks	13
Update Task	14
Create Task	14
Documents	15
Notes	16
Create Note	16
Logs	18

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

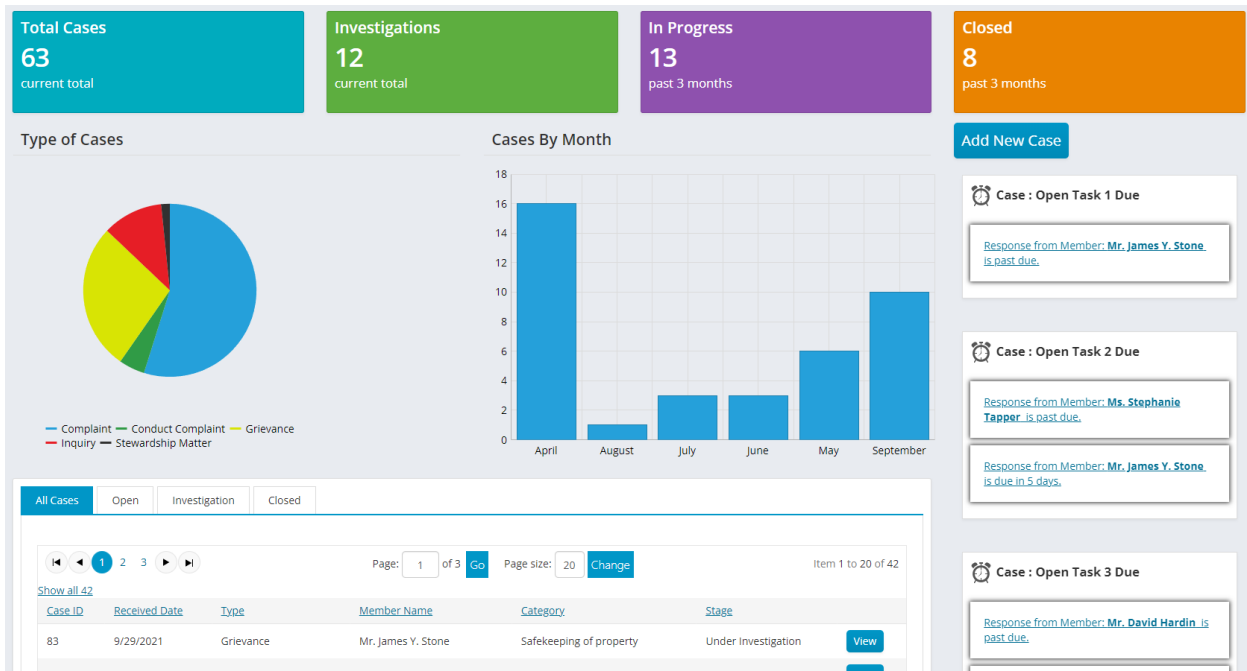
The tiles across the top show counts of all cases in the system and at various stages. The pie chart and bar chart show the number of cases by type and number of cases by month (by date submitted).

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

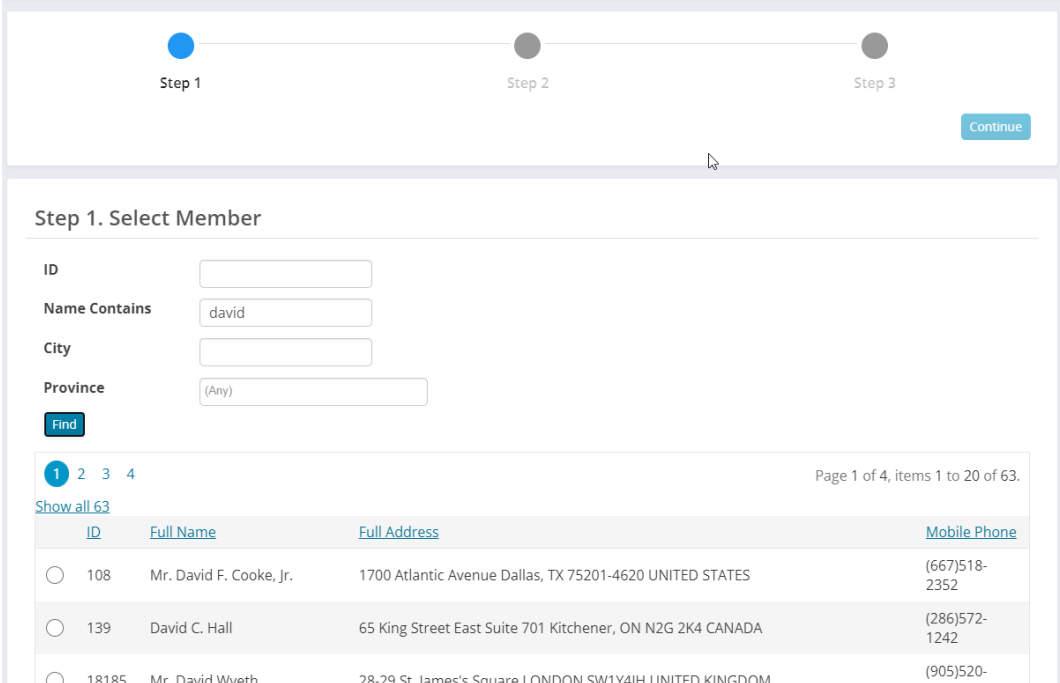
This section describes how to create a new case, step by step.

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.



Step 1. Select Member

ID

Name Contains

City

Province

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

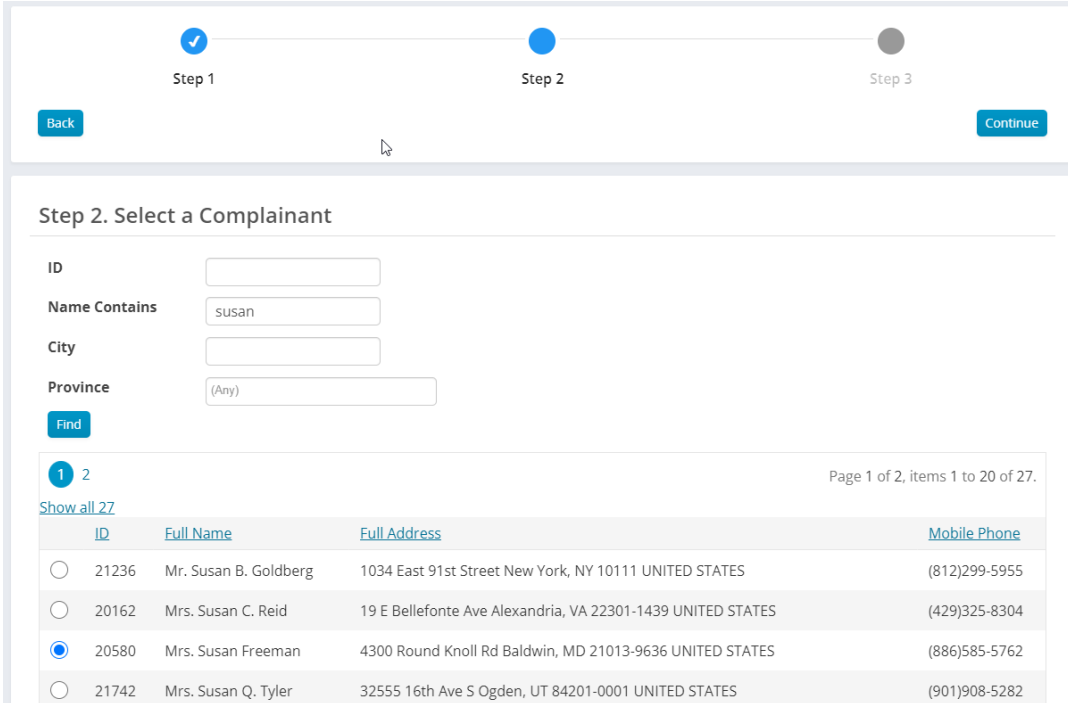
[Show all 63](#)

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' and contains search filters: ID, Name Contains (with 'susan' entered), City, and Province (with '(Any)' selected). A 'Find' button is below the filters. Below the filters is a table of results with 27 items, showing the first five. The third item, Mrs. Susan Freeman, is selected with a blue radio button. The table has columns for ID, Full Name, Full Address, and Mobile Phone.

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

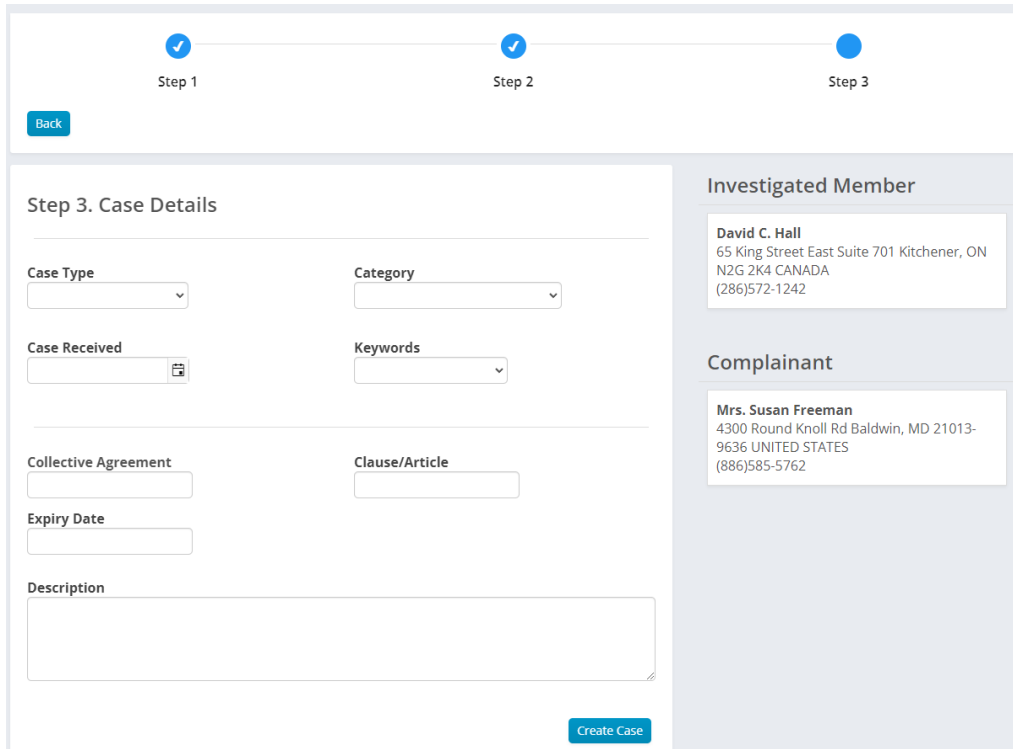
Create Case Step 2

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	
Emailed Member	02Email	9/29/2021	✖
Under Investigation	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

Jai Pandit	✘
Mr. Brian Erdogan	✘
Ms. Carol A. Hamilton	✘

Add

Participants Panel in Case Detail Page

Add Participant

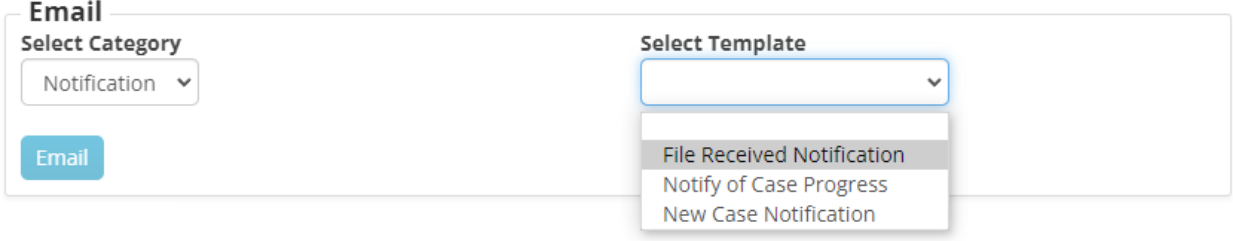
	ID	Name
<input type="radio"/>	107	Paula Caller - Investigator
<input type="radio"/>	108	Mr. David F. Cooke, Jr.
<input checked="" type="radio"/>	111	Richard Harris - Investigator
<input type="radio"/>	23098	Benton Holley - Counsel
<input type="radio"/>	23151	Al Soria - Counsel

Add

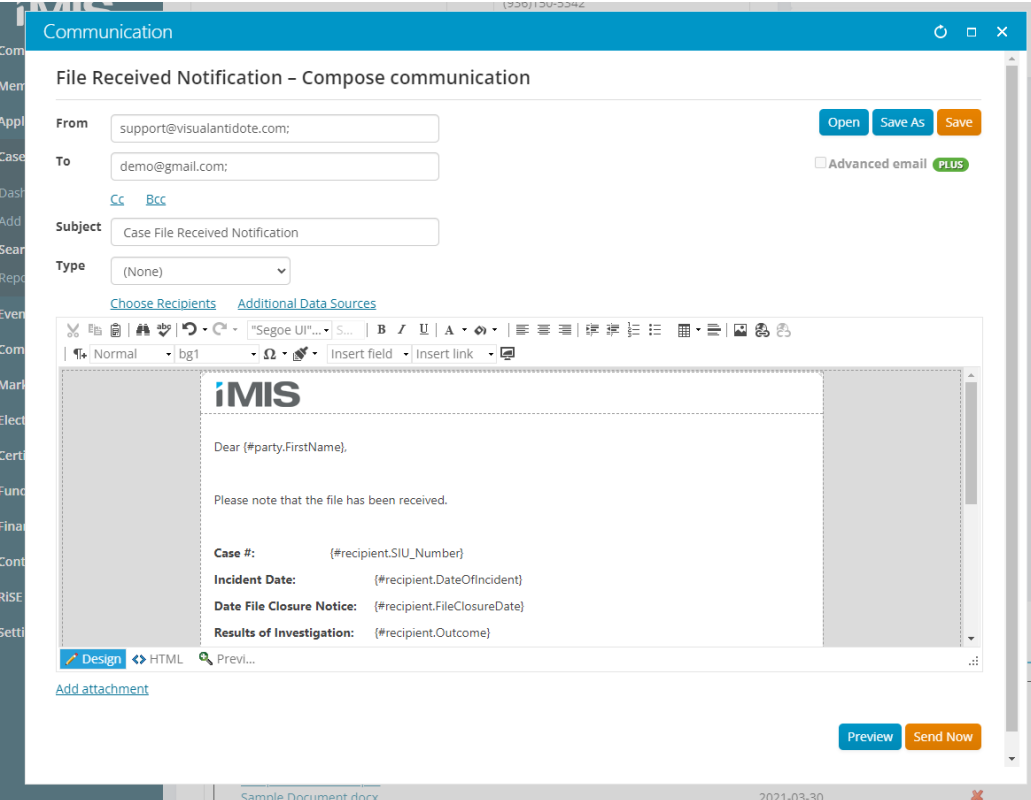
Add Participant Pop Up

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 user interface for selecting an email template. It features two dropdown menus: "Select Category" with "Notification" selected, and "Select Template" with a dropdown menu open showing three 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 displays the "iMIS Communication" editor window titled "File Received Notification - Compose communication". The interface 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", along with an "Advanced email PLUS" checkbox. Below the fields is a rich text editor with a toolbar and a preview area. The preview area shows the email content, including the iMIS logo, a greeting "Dear (#party.FirstName).", a message "Please note that the file has been received.", and several fields with dynamic data: "Case #:" (#recipient.SIU_Number), "Incident Date:" (#recipient.DateOfIncident), "Date File Closure Notice:" (#recipient.FileClosureDate), and "Results of Investigation:" (#recipient.Outcome). At the bottom, there are "Design", "HTML", and "Preview" tabs, an "Add attachment" link, and "Preview" and "Send Now" buttons. The status bar at the bottom shows "Sample Document.docx" and the date "2021-03-30".

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.

Edit Activity ↻ □ ✕

Title

Activity Type

Date

Activity Notes

B I U S x_2 x^2 |

Styles ▾ | Format ▾ | Font ▾ | Size ▾ | **A** ▾ | **A** ▾ |

Emailed Member the starter kit

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

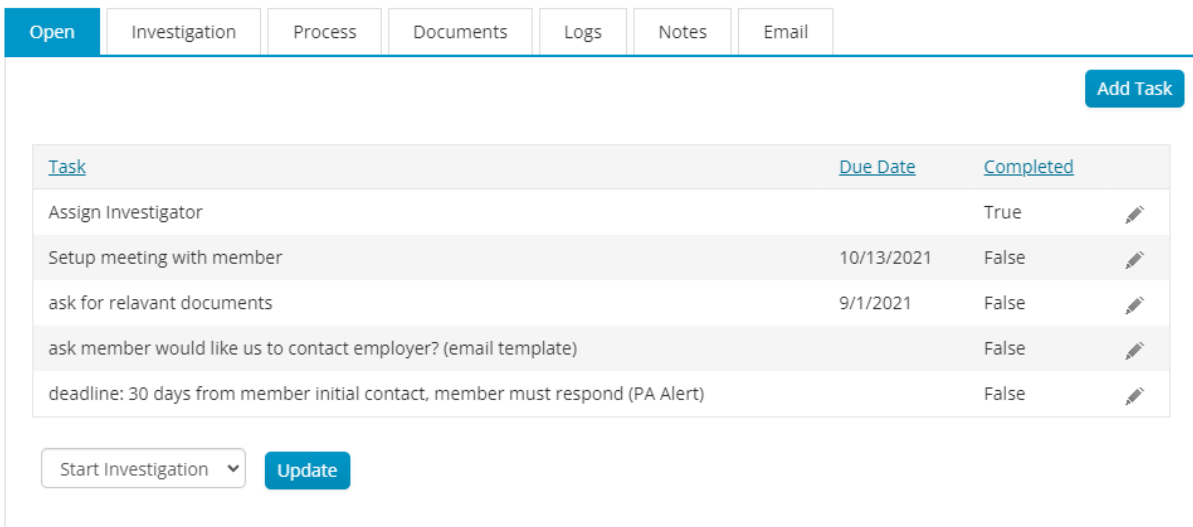
Case Tasks

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
- 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

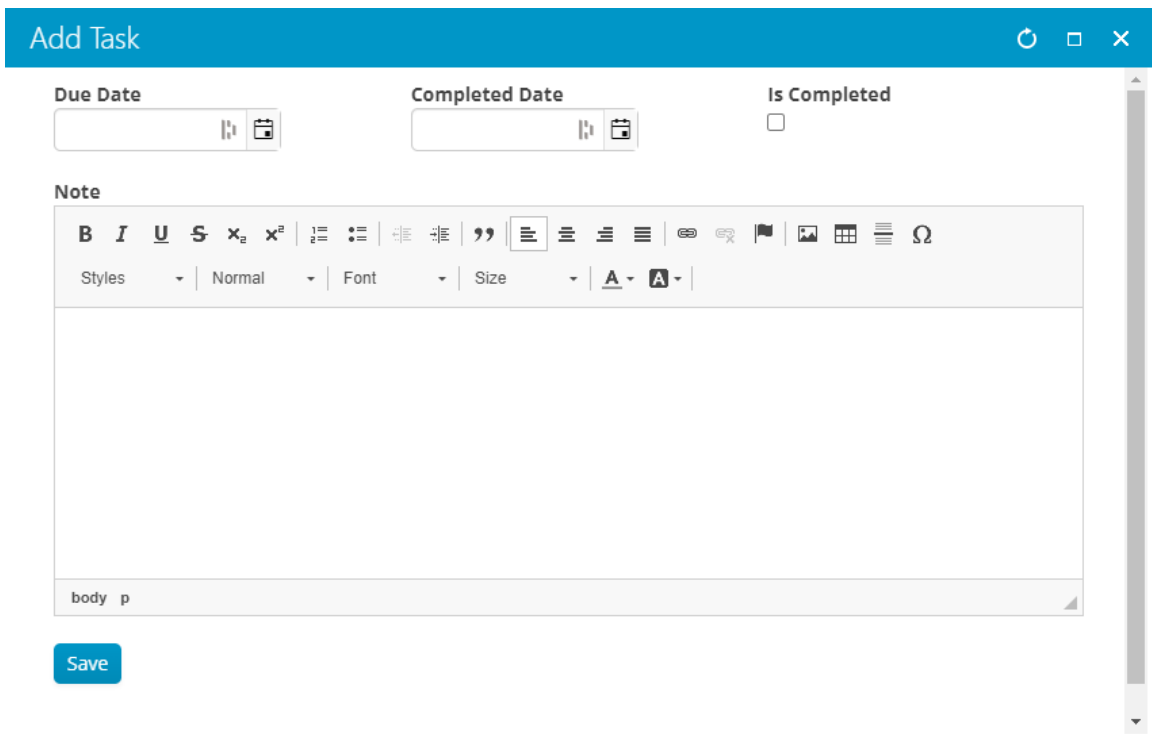
Case Tasks Panel

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.















Add Task



Due Date 

Completed Date 

Is Completed

Note

B I U S x₂ x² |            

Styles | Font | Size |  

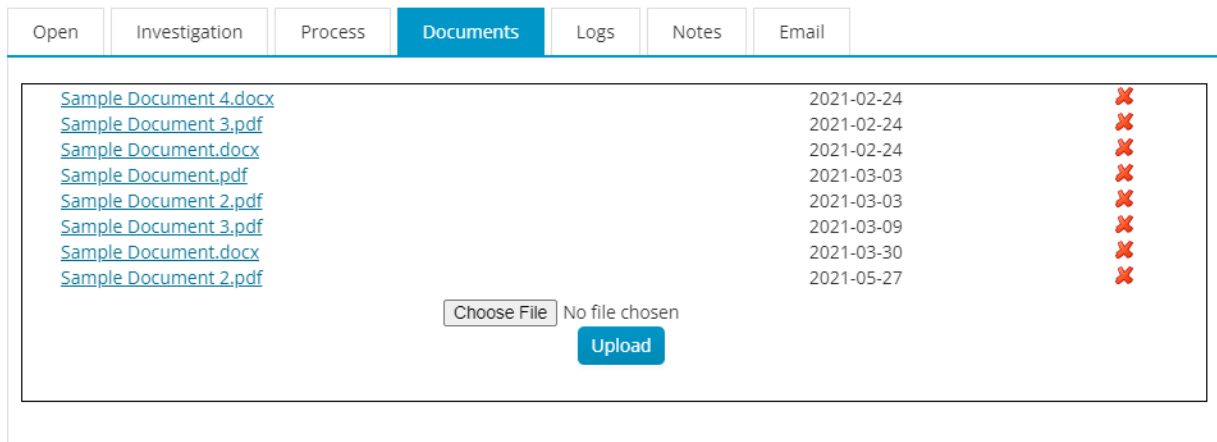
body p

Save

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 with columns for document name, date, and a delete icon (red X). Below the table is a file upload area with a 'Choose File' button, the text 'No file chosen', and an 'Upload' button.

Document Name	Date	Delete Icon
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

Open	Investigation	Process	Documents	Logs	Notes	Email
						Add Note
Stage	Date	Case Note			Edit	Remove
In Progress	5/6/2021	<p>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>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.

Edit Note

Stage: In Progress Date: 05/06/2021

Note

B I U S x_a x^a | [List Icons] | [Quote Icon] | [Table Icon] | [Link Icon] | [Image Icon] | [Media Icon] | [Omega Icon]

Styles | Format | Font | Size | A- A+

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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.

[Update](#)

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.

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 ->