

New case management interface

As part of ongoing improvements to the site, we have given the case management pages a new and improved look and added some enhancements to the way you manage your cases.

1. Cases sidebar

We've added a new cases sidebar to the cases page and all case management pages. The sidebar is populated with your ten most recently visited cases, allowing you to switch between them with ease, and reducing the time it takes to find and access the cases you manage.

2. Case management buttons

The case management pages have a new and improved layout. All case actions were formerly housed in a 'Management' tab. These actions have been moved to the top of the page, making them easier to find and use no matter where you are.

3. Assigning cases

It's now much easier to assign yourself and other team members to a case. Where you previously had to share a case with individual team members, you can now assign multiple team members in the new 'Assigned' section.

Here, you can see a list of all assigned team members and their contact details. You can assign new team members or remove people you know are no longer managing the case. Team members will receive confirmation by email when they have been assigned. It's even easier to assign yourself to a case by clicking the blue 'Assign myself' button.

The screenshot displays the case management interface for 'Aaron Jackson & Jake Cooper'. At the top, a navigation bar includes buttons for 'Add new activity', 'Add new profile', 'View discussions', 'National access', 'Set case as inactive', and 'Delete case'. Below this, the case title is followed by the case reference '1128' and an 'Assign myself' button. The 'Assigned to' section lists 'Keeley Roberts', 'Sebastian Smithers-Baker', 'Ray Powell', and '2 others'. The main content area features tabs for 'Activity record', 'Profiles', 'Documents', and 'Reports'. The 'Activity record' section shows a list of activities, including 'Discussion Jamie and Joseph and Beatrice: Match confirmed' and 'Discussion Jamie and Joseph and Beatrice: Marked as progressing to panel'. A sidebar on the right, titled 'Cases', lists ten recently visited cases, with 'Aaron Jackson & Jake Cooper' at the top. Red callout boxes with numbers 1, 2, and 3 highlight the sidebar, the top navigation bar, and the 'Assign myself' button, respectively.

4. Activity record

To make it easier to see case activity, we have added an activity record to the case. Here, you can see the history of all activity that has taken place for the given case, from profile creation to discussions. You can filter the record by type of activity and expand or collapse records as you see fit. All recent activity will appear at the top of the page.

5. Storing a note or document against a case

To help you keep better records, we've added the ability to store notes or documents against a case. You can do this via the new 'Add new activity' button. The case note or document will be stored against the case and recorded on the activity record. The document can also be found in the 'Documents' tab.

You can choose to notify certain team members of a case note; they will receive an email with a link to the note. The note can also be linked to active discussions for the case. Once linked, the case note will be listed in the discussion for your organisation only.

6. Consolidating profiles

For team members who are managing both adoption and commissioning cases, we have consolidated the different profile types into one tab. All profiles for a single case are now stored in the same place.

The screenshot displays the 'Cases' management interface. At the top, there are navigation buttons: 'Add new activity' (highlighted with a red circle and number 5), 'Add new profile', 'View discussions', 'National access', 'Set case as inactive', and 'Delete case'. The main case title is 'Aaron Jackson & Jake Cooper' with a case reference of '1128'. Below the title, there are tabs for 'Activity record' (highlighted with a red circle and number 4), 'Profiles', 'Documents', and 'Reports'. The 'Activity record' tab is active, showing a list of activities. The first activity is 'Discussion Jamie and Joseph and Beatrice: Match confirmed' by Shannon Rogers on 27th February 2018. The second activity is 'Discussion Jamie and Joseph and Beatrice: Marked as progressing to panel' by Shannon Rogers on 20th February 2018. The third activity is 'Discussion Jamie and Joseph and Beatrice: Document received - (Document title)' by Shannon Rogers on 20th February 2018. The fourth activity is 'Discussion Jamie and Joseph and Beatrice: Message received' by Shannon Rogers on 18th February 2018. On the right side, there is a 'Cases index' list with various case names and references, such as 'Alexander Rogers & Poppy Bell', 'Aaron Johnson & Stacey Walsh', 'Dan Roberts', 'Elizabeth Khan & Carrie Harris', 'Ella Harris & Leo Kelly', 'Chloe Richards & Harvey Davies', 'Adele Simpson', 'Abbie Shaw & Dylan Morgan', and 'Dale King & Jane Williams'.

For further help and support, contact us via our [contact page](#) or call our support team on 0800 368 8549.

Note that all names shown in this document are fictional and are used for training purposes only. Any resemblance to actual persons, is purely coincidental.