Managing cases

Using the Healthwatch CiviCRM

About this resource

To help manage and track complex sequences of interactions between people in your organisation and contacts in your CRM, there is the Cases function.

You can use cases to help you to:

- Track a specific workflow or set of precures that must be followed that involves different members of staff
- Allow staff to manage and track interactions while avoiding duplication
- Automate the task of resembling and scheduling follow-up activities.

This resource looks at how to create and manage Cases on your CRM. We recommend that you have a good understanding of using activities, before moving on to cases.

What is a case?

CiviCase is used to tracking and managing sequences of interactions between people in your organisation and contacts in CiviCRM.

Each Case will have a type, status, date and a number of activities.

To use Cases effectively, you need a solid understanding of how to use activities. An activity is an interaction which has taken place, such as, you received a phone call or you received feedback on a specific care provider.

If you have enquiry or consumer feedback information from a person who has used a care service then this should be recorded via the 'Feedback and Signposting Wizard' option from the left-hand side Staff Menu.

For more information on the Wizard please see the Wizard video and PDF resources. Once the Wizard has been submitted a Case, containing the data added, will be created.

If you have other data you would like to record in a Case, say Enter and View information, use the New Case link found in the Cases menu.

Accessing cases

To access Cases within your CRM you can:

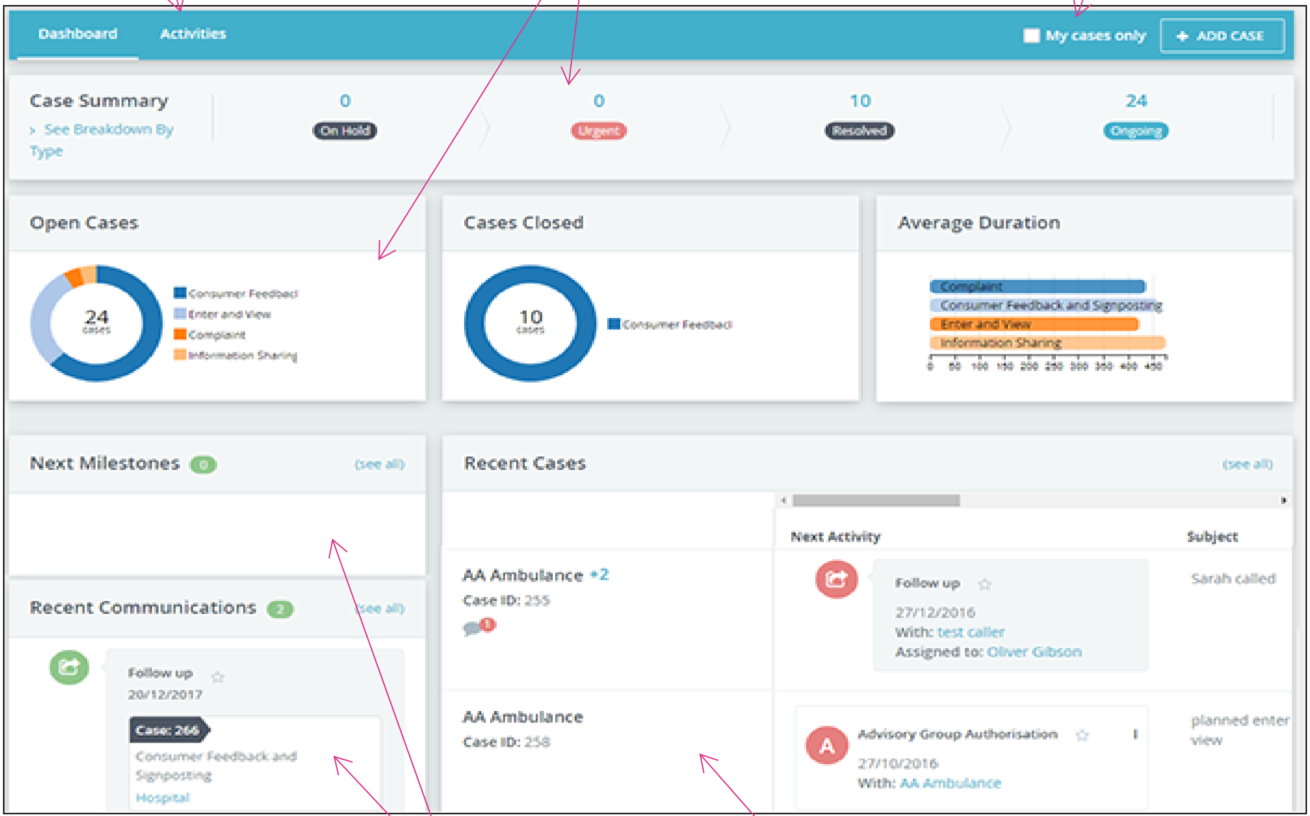
- Go to a CRM contact record (individual or organisation) and see their **Cases Tab**.
  This shows you how many cases that contact has been involved in.
  You can then click on a Case to open the Case Details
- Go to the Cases menu and access the **Case Dashboard**. The Case dashboard gives you an overview of Cases in the system and shows you recent Case activity. There are 2 Tabs; 'Dashboard' and 'Activities'. On the **Case Dashboard – Dashboard** tab you can…

The Cases Dashboard

Change between the dashboard and Activities tab here

Statistics
See a statistical summary of different case types and case statuses. Includes a graphical representation of Open and Closed Cases.

My Cases
Alter the list of results so that only the Cases where you are the Case Manager is shown (My Cases)



Activity - Milestones & Communications
Cases contain a number of activities. For example, in one Case you may have 2 Enquiry Feedback activities, 1 Signposting activity and 1 Follow Up activity.

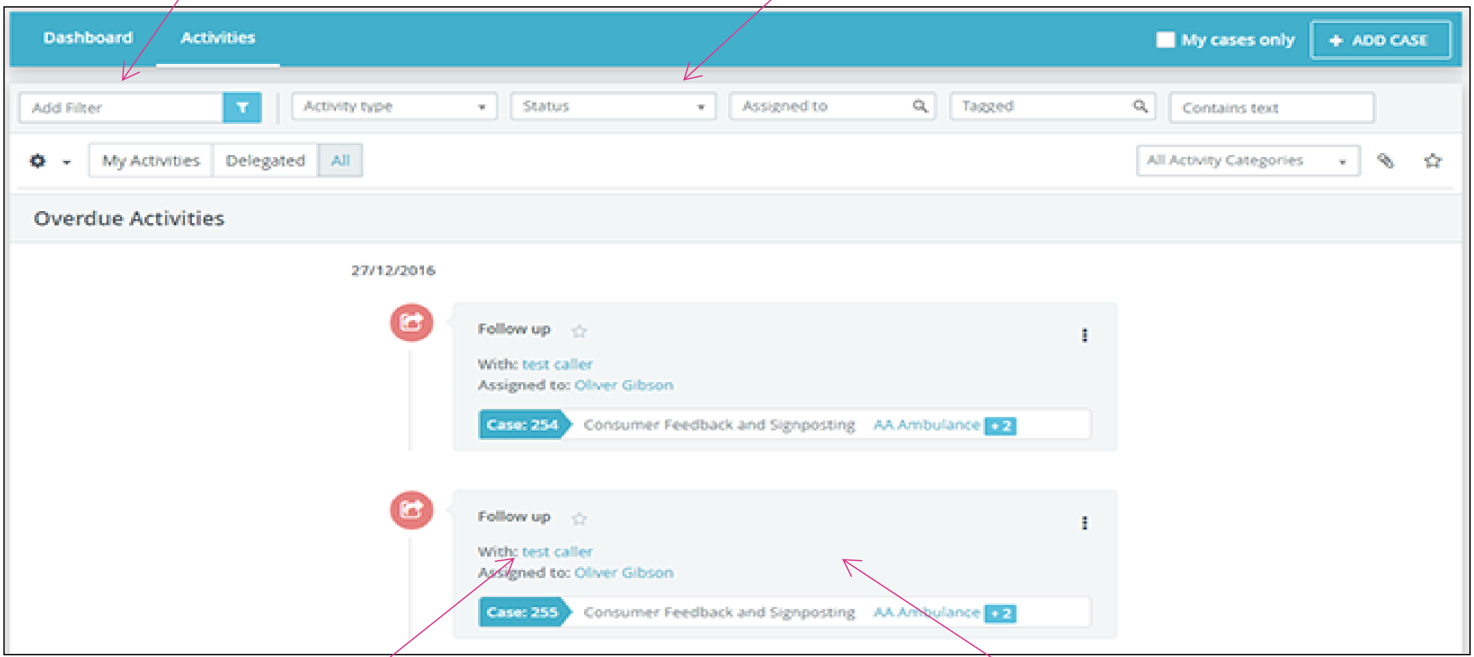
On the Dashboard page, recent Case Activity Milestones and Communications (say a scheduled phone call in a case) will be listed here.

Recent Cases
Recently added cases are listed here. You can scroll to the right to see case details or click on a Case to Open the Case.

On the **Case Dashboard - Activities tab** you can see a list of Activities in Cases. You can apply filters at the top of the page with the activity results listed below. Within the results you can click on an activity to see more details or Edit/Delete the activity.

Filters - Add Filter
You can add new filters to the ones available here, like Filter on the 'Nature of Enquiry/Feedback'

Filters
There are a number of filters such as Activity Type, Status or search for specific text terms.



You can click on a contact's name to go to the contact record.

Click on an Activity to see the full Activity detail.

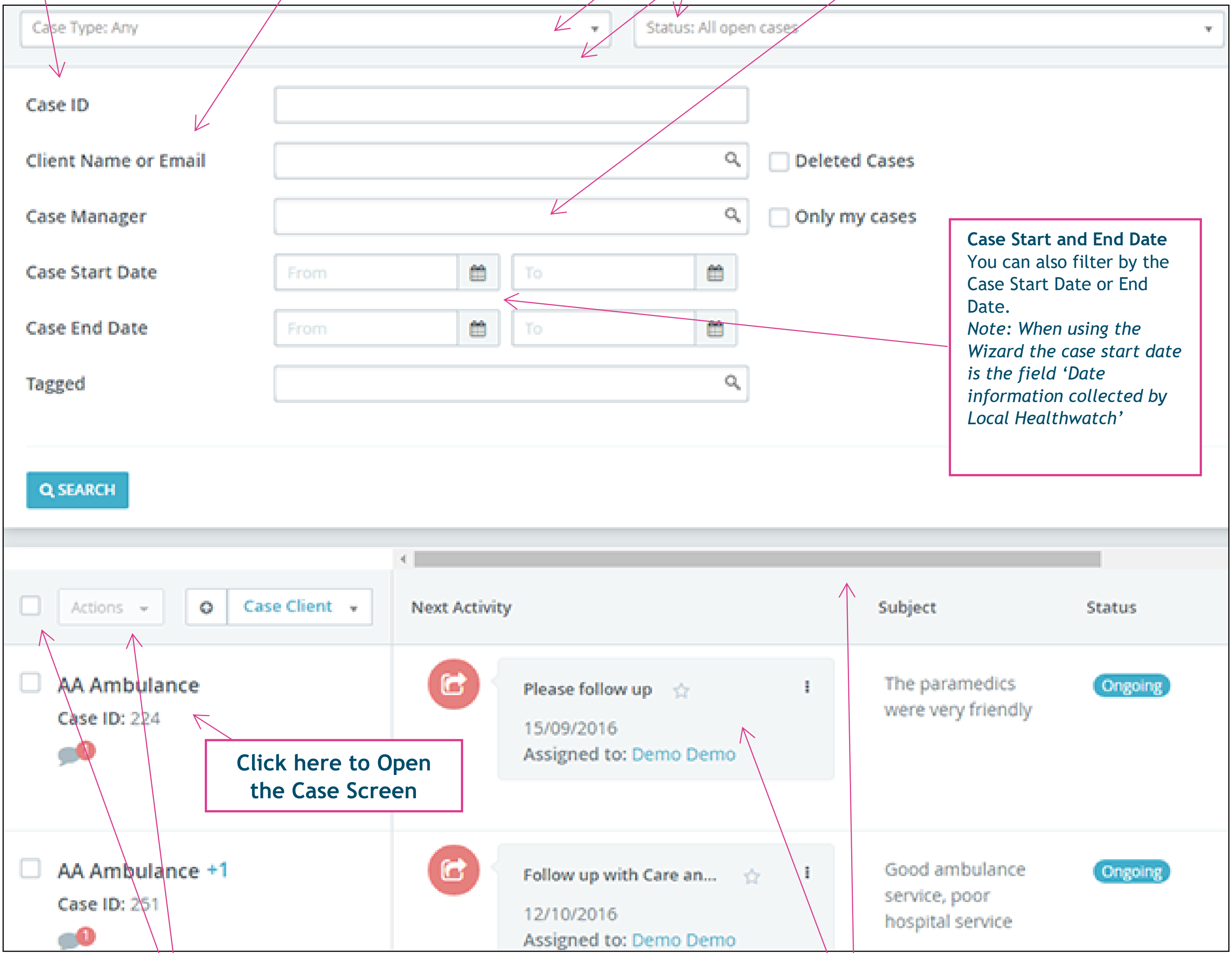
You can also use the **Find Cases** link to search through all the Cases in your CRM. See Find Cases in the Case menu.

Case ID Number
Each case has its own ID number. Here you can search by Case ID number.

Who Is Involved
You can search by the contacts involved in the case (this is a lookup where you can choose a contact from a list)

Case Type and Status
Filter by Case Type and Status using the filters at the top of the screen. Cases added via the Wizard are of type 'Consumer Feedback and Signposting'

Case Manager
You can also search by Case Manager. You can see all the Cases added by a specific staff member, or you can see all your Cases.



Case Start and End Date
You can also filter by the Case Start Date or End Date.
Note: When using the Wizard the case start date is the field 'Date information collected by Local Healthwatch'

Click here to Open the Case Screen

Performing Bulk Actions
You can select all Cases or some Cases (using the tick boxes) and then perform Actions. For example, you can Change the Case Manager, Change the Case Status or Export the Case Details for the selected cases.

Results
Results are listed below the filters. Click on a Case to open the case, or scroll right to see details of each Case.

When you have **Opened the Case Screen** you will see a number of Tabs

These are the contacts involved in the Case (if this was entered via the Wizard this would be the person receiving the care and the organisations involved). Also see the Case Type, Status and Start/End Dates.

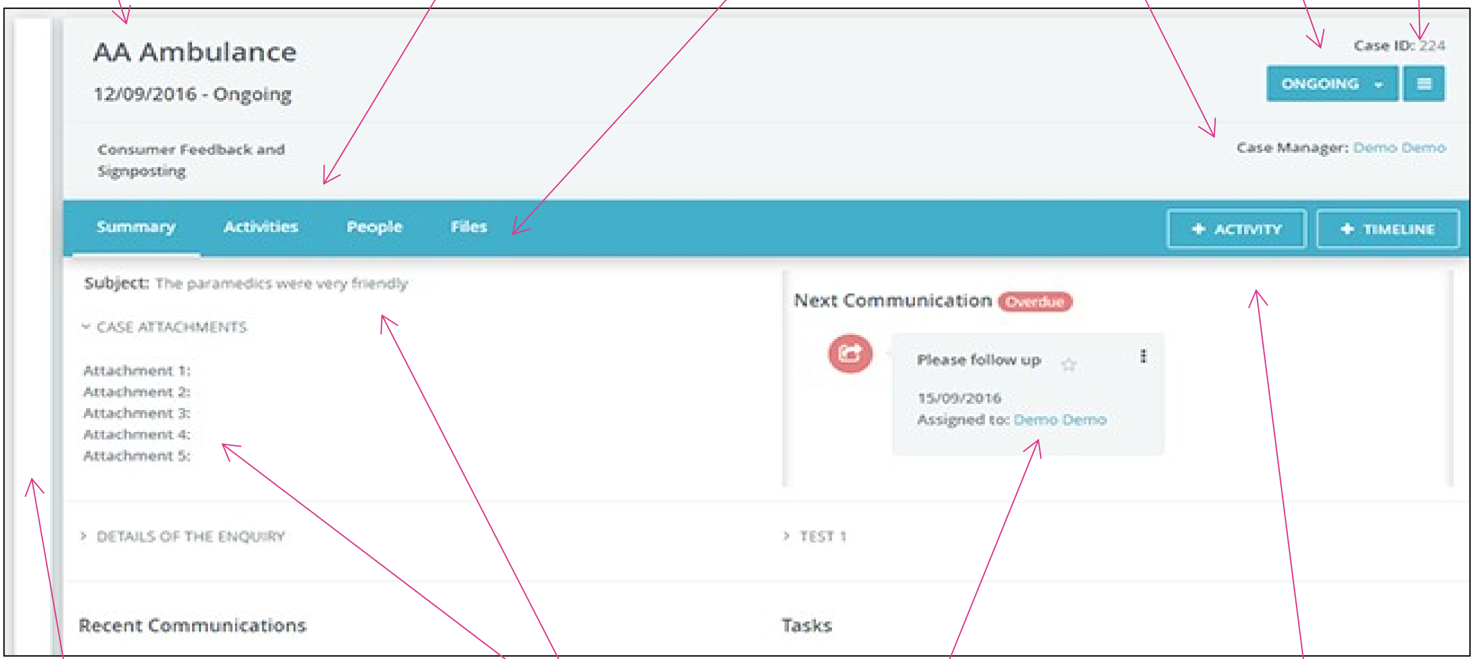
Click here to access the Case Manager's contact record

Here you can export, print, delete the case and perform other case actions.

Edit the Case Status
Here you can edit the Case Status

Change Between Tabs within the Case
You can move between the Summary, Activities, People and Files tab.
By default you will start on the Summary tab.

Files tab
Click here to move away from the Summary screen and see and add new Files to this Case

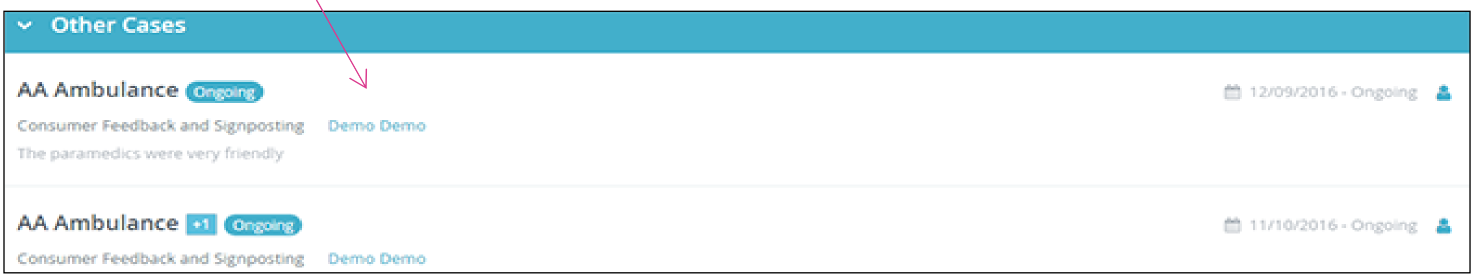


Returning to Results
If you accessed the Case Screen from a list of results click the sidebar to re-open the results and search filters.

On the Summary tab see
- the Case subject
- if relevant the text details of the enquiry (the text description added via the Wizard)
- Any Case Attachments
- Upcoming and recent communications/activity tasks (like a follow up Phone Call activity) will be listed here

Add a New Activity
Click here to add a new Activity to the case. For example, a new Signposting Activity.

Whilst on the Summary tab you can scroll down the page to see a list of other cases involving the same Contacts



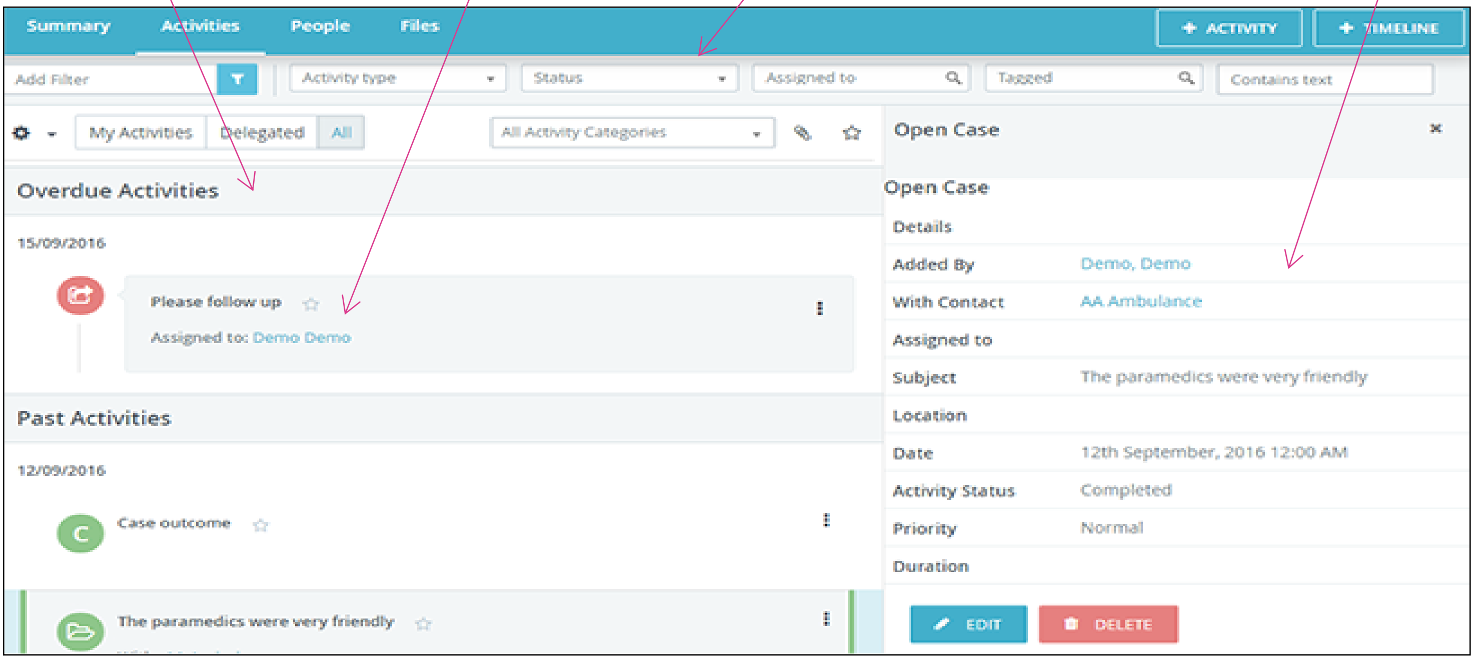
You can also click on the **Activity Tab** on the **Opened Case Screen** to see a list of all activities related to that case.

See a list of all of the Activities with any overdue activities at the top of the list.

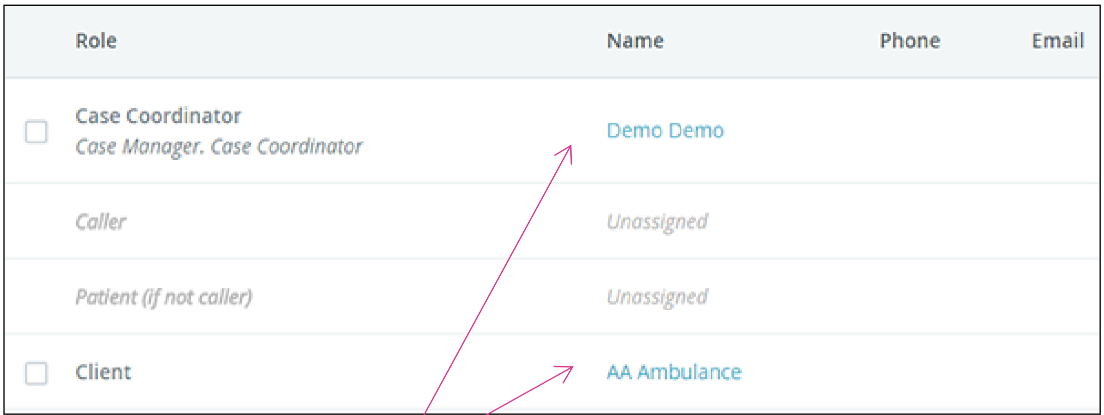
Click on a contacts name to go to their contact record.

You can filter the Activities shown using filters already described in this document.

Click on an Activity to open the Activity details. You can then Edit and delete the Activity.



You can also click on the **People Tab** on the **Opened Case Screen** to see a list of all contacts involved in the case.



Role	Name	Phone	Email
Case Coordinator *Case Manager. Case Coordinator*	Demo Demo		
Caller	*Unassigned*		
Patient (if not caller)	*Unassigned*		
Client	AA Ambulance		

Click on a contacts name to go to their contact record.

You can also add a contact to a new Case Role.

For example, if this is a Consumer Feedback and Signposting Case you will see the organisations involved and the caller or separate patient’s name.