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Description	Documentation on the Councillor casework workflow

Councillor casework Workflow

The Councillor Portal provides Councillors with a personalised experience, giving them information from multiple places in one place. This is also where Councillors raise and respond to casework for Council officers to action.

Use this guide to learn about the Councillor casework workflow.

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Workflow stages

The Councillor casework workflow consists of the following stages:

- Create casework
- Triage
- Case assigned
- Information required from Councillor
- Resolution

Important note about case notes: Councillors now manage their casework through CaseViewer in the same way that caseworkers do. This means that they will now also use case notes. This allows caseworkers and Councillors to update and respond to cases without the need for the task to be assigned to them to complete. All case notes added against the case will be visible to anyone who has access to the case.

Create casework

This is the initial request, submitted by the Councillor through the portal. They select the category and service type, and have the facility to add locations, attachments, custom search tags (for CaseViewer searching), and other emails to receive updates on the case.

The category and service type selected by the Councillor determines which service area caseworker group receives the casework. This would be the **Case assigned** stage. If there is no relevant group to receive this request, this will instead be sent to the **Triage** stage.

Triage

This stage is created if the category and service type selected (or if they select 'Other') has no relevant caseworker group to assign the case to automatically.

The triage team will receive a notification with a link that takes them straight to the task in CaseViewer.

The triage team can:

- View and add attachments
- Assign the case to the relevant caseworker group
- Send the case back to the Councillor for further information
- View, add, and download progress updates
- Resolve the case

Case assigned

This stage is created if the category and service type selected has a relevant caseworker group to assign the case to automatically.

The assigned team will receive a notification with a link that takes them straight to the task in CaseViewer.

The assigned team can:

- View and add attachments
- Assign the case to a different caseworker group
- Send the case back to the Councillor for further information
- View, add, and download progress updates
- Resolve the case

Information required from Councillor

This stage is completed by the Councillor and provides them the opportunity to provide further information as requested by the triage team or the assigned service area team.

The Councillor can:

- View and add attachments
- Provide the further information required
- Gather information from other parties
- View and add progress updates
- Resolve the case

Resolution

This stage is completed by the Councillor and provides them the opportunity to confirm the case has been resolved or send this back to the triage team or the assigned service area team that marked the case as resolved.

The Councillor can:

- View and add attachments
- Send the case back to the triage team or assigned service area team
- Gather information from other parties
- View and add progress updates
- Resolve the case

Configuration

Case notes

Throughout the life of the case, Councillors and caseworker groups can also view and add case notes through CaseViewer. This enables Councillors and caseworkers to update the case through case notes, even when they are not assigned a task to complete.

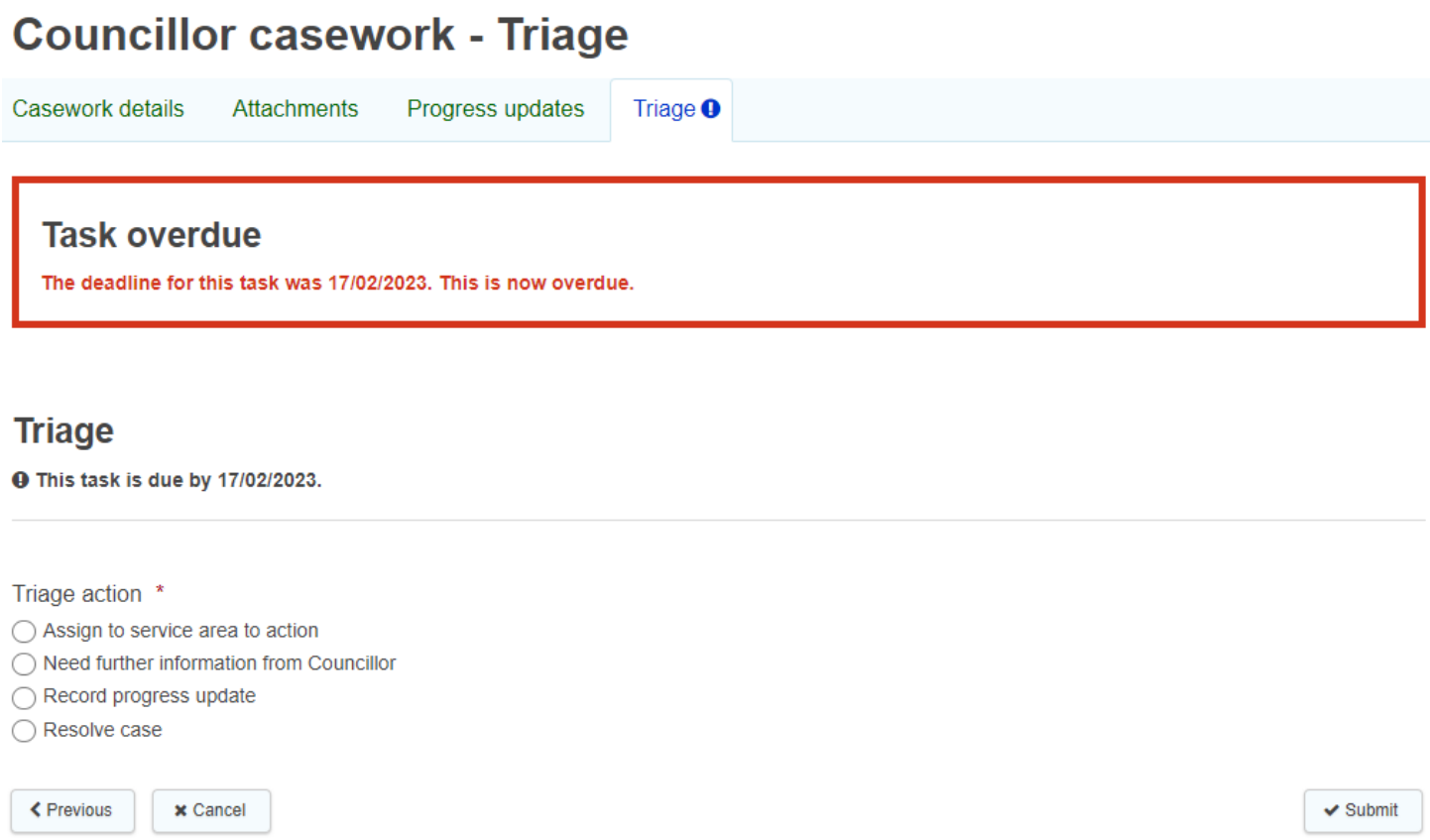
It is important that you check, respond, and update the case notes against the case.

SLA targets

The team assigned has 5 working days to provide an initial response to the Councillor. After this response, there is 10 working days to provide the next response to the Councillor. The task due date is displayed within the task.

Reminder notifications are sent 2 working days and then every 5 working days until the task is updated.

If the due date has been breached, the Triage team will automatically be notified. You will also see a breach message warning within your task.



Councillor tasks have 10 working days to complete their task, with a 5 working day reminder. **If they do not action their task within 10 working days, their case will automatically be close via an 'escalation integration'.**

Progress updates

The workflow maintains a record of progress updates provided by the Councillor and the caseworker teams assigned at each stage. You can find this on the **Progress updates** tab of your task. Both Councillors and caseworker teams have this tab.

> The triage team and service area teams can download a PDF copy of the **Progress updates** from within the task.