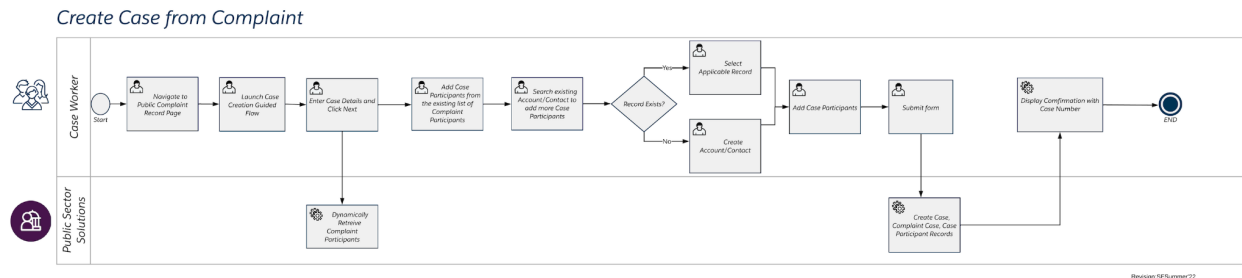


Create Case from Complaint

In Public Sector Solutions, this process allows a case worker to create a case, search for individuals or organizations and add them as case participants based on a complaint that is already existing in the system.



Overview

Concerns on health, safety, or wellbeing that are reported by constituents are registered as complaint records. A caseworker or intake officer creates a complaint record and includes details on the issue. When there is a complaint about a social issue or concern that is screened in and requires further attention, a case is created to manage the lifecycle of this process.

Use Case Scenario

Concerns reported by constituents are registered as complaint records. Complaint is reviewed and a case is created when further attention is required by the agency to address the situation. For example, a teacher notices bruises on a child's arm, and calls a city hotline to report potential abuse, this is captured as a Complaint. Once the complaint is screened-in, the case worker can create a case using the guided flow.

Assumptions

- The Case Creation OmniScript guided flow is embedded in the Public Complaint Record Page.

User Story

- From the Public Complaint record detail page, the case worker launches the Case Creation guided flow.
- The case worker fills in the case details and adds case participants either by selecting existing complaint participants or by selecting appropriate account/contact records as case participants.

- Once the guided flow is completed, Case, Case Participant, and Complaint Case records are created in the system.

Business Objective

Provide an easy to use guided flow for the case workers to create a case, to search for individuals/organizations and to add them as case participants based on a complaint that is already existing in the system.

Business Value and Benefits

- Intuitive UI
- Integrate with other business processes
- Mobile and iPad ready

Process Package Includes

Omniscript (1)

1. Create New Case.json

Data Raptors (8)

1. GetAccountRecordsForTypeAhead
2. FetchComplaintParticipants
3. searchAccount
4. CreateCaseAndComplaintCase
5. CreateCaseParticipant
6. CreateCaseParticipantFromPublicComplaint
7. GetCaseID
8. GetComplaintCaseID

Flexcards (6)

1. ComplaintParticipants.json
2. CreateAccountFlyout.json
3. CreateContactFlyout.json
4. CreateContactAndAccount.json
5. SearchParticipants.json
6. displayLimitation.json

Custom LWC module's (9)

1. displayComplaintParticipants
 - a. displayComplaintParticipants.html

- b. displayComplaintParticipants.js
 - c. displayComplaintParticipants.js-meta.xml
- 2. selectFromList
 - a. selectFromList.html
 - b. selectFromList.js
 - c. selectFromList.js-meta.xml
- 3. createAccount
 - a. createAccount.html
 - b. createAccount.js
 - c. createAccount.js-meta.xml
- 4. createContact
 - a. createContact.html
 - b. createContact.js
 - c. createContact.js-meta.xml
- 5. selectAndBuildList
 - a. selectAndBuildList.html
 - b. selectAndBuildList.js
 - c. selectAndBuildList.js-meta.xml
- 6. selectFromList
 - a. selectFromList.html
 - b. selectFromList.js
 - c. selectFromList.js-meta.xml
- 7. selectedRecord
 - a. selectedRecord.html
 - b. selectedRecord.js
 - c. selectedRecord.js-meta.xml
- 8. customDatatable
 - a. customDatatable.js
 - b. customDatatable.js-meta.xml
 - c. picklist-template.html
- 9. datatablePicklist
 - a. datatablePicklist.html
 - b. datatablePicklist.js
 - c. datatablePicklist.js-meta.xml
 - d. datatablePicklist.css

Configuration Requirements

- This Omniscript must be part of Public Complaint record page.
- In order to add Case Participants based on existing Complaint Participants, the same role and status should be available in both Case Participant and Complaint Participant objects.
- Flexcards must be deployed and activated before the Omniscript in the correct order as mentioned in the Process Package section in this document.