

Web Portal Guide for Introducers

OVERVIEW

The web portal has been designed to provide a secure and quick way to view your case management data and share this with others, such as Introducers and Solicitors, allowing them to update data from any location (providing they have internet access and a suitable device).

Useful Information – Press Ctrl F5 to refresh screen. Information is in real time.

SECURE LOGIN (WITH ABILITY TO CHANGE PASSWORD)

You will initially be sent an email with details of the web site address and your password. You can then login via that web site address using your Email Address and Password:-

Portal Login

Email Address:

Password:

Submit

[Forgot your password?](#)

Click **Submit** or if you have forgotten your password, click on **Forgot your Password?** You will be emailed a new password. Once you have successfully logged in, you will see the **Portal Home** screen.

[[Portal Home](#) | [Logout](#)]

Case Management Portal

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Portal Home

Welcome, emailtesting@legissolutions.co.uk



[View Cases](#)



[Submit a New Case](#)



[View Portal Guide](#)



[Change Password](#)



[Logout](#)


Please ensure you click on **Logout** when you want to end your session.

VIEW CASES

View Cases will display a multi functional screen.

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Case Management Portal

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Portal Home > Cases Overview

View Cases You Have 13 Action Items

emailtesting@legissolutions.co.uk Last Updated: 29/11/2015 19:07:36

Case Handler: Search: [Find Next](#) [Download CSV](#) [Print](#) [Help](#)

[View Active Cases](#) [Key Stage: All](#) [Opened Between:](#) and

Portal Ref.	Client Name	Last Act.	Activity Desc	Opened	Sol. Sent	Accepted	CFA Sent	CFA Sign	Paid	Credited	Rejected	Rej.	Notes	Docs
000239/DIBDEN	Dibden, Jayne	27/10/15	Claim Received vi	27/10/15									View	View
799999/LONG	Long, Darren	29/11/15	Case incepted ont	27/10/15									View	View

Alerts

There are two buttons, one with the text displayed in red and one with the text displayed in green.

You Have 1 Unread Note**You Have 20 Action Items**

The buttons will only appear when there are alerts to be actioned.

Unread Notes

The button with red text will alert you to any “unread notes”. Click on the button to view those notes.

Unread Notes ✕

Ref: 000023/VET/BROWN 2015/06/16 23:32

Please update us on Client contact

[Mark as read](#)

Click on the **Mark as read** button to clear the notification. Note: this will clear the unread notification but you will still be able to view this note from the **View notes** option on the **Case List**.

Action Items

The button with green text will alert you to any **action items**. **Actions items** are automatically generated when a new case is submitted and they detail any missing information that is regarded as “critical”. Click on the button to view those items.

Action Items ✕

Ref: 000019/VET/NEW VERSIO 2015/06/16 18:35

Critical Information Missing - Client Address

Ref: 000019/VET/NEW VERSIO 2015/06/16 18:35

Critical Information Missing - Client Insurance Type

The **action items** will disappear as soon as the data is entered on the case (either via the Web Portal or via Legis Synergy Case Management).

Search and Sort Facilities

Enter text into the **Search** box. As you type, it will remove the background colour of any column that has a match on your search criteria.

All columns can be sorted, by clicking on the column name. For example, click on **Portal Ref.** to alphabetically sort the list on the portal reference. *Note: the default sort is Client Surname/First Name.* To search on an opened date range, enter the date range and the results will refresh to only show cases that have an opened date within that range.

Download CSV/Print option

To download the list to Excel, click on the Download CSV button. Select if you would like to download Active or Archive Cases. The list will then be output to Excel.

Download CSV

Download all active cases, or all archived cases?

Download Active Cases

Download Archived Cases

Drop down list to filter on Active/Archive Cases

Click on the drop down list displaying **View Active Cases** to change the view. The options are to **View Active Cases** (this is the default) or **View Archived Cases**.

View Active Cases

View Active Cases

View Archived Cases

Drop down list to filter on Key Stages

Click on the **Key Stage: All** drop down list to change the view. Example shown here (Note - **Key Stage: All** is the default)

Key Stage: All

Key Stage: All

Key Stage: Opened

Key Stage: Vetting

Key Stage: Solicitor Sent

Key Stage: Accepted

Key Stage: CFA Sent

Key Stage: CFA Signed

View Cases List

A full list of cases, colour coded to show latest key stage, ordered by Client Surname/First Name (as default). Click on a column heading to change the sort order.

Portal Ref

Click on a reference in the **Portal Ref** column to **Edit/View data** specific to that case.

The Client Details section will initially be expanded. Scroll down and click on any section to expand the view to show that data.

If you have made any changes, click on the **Update** button at the bottom. This will then validate the data, displaying any errors found. Once the validation check is successful, the data will be updated.

If you have not made any changes, just use your back button in your browser to return to the **View Cases** screen or click on **Portal Home**.

Last Act.

The Last Act. column shows the date of the last key stage - click on this date to view all key stages.

To submit a new key stage (e.g to mark the case as "Emailed to Solicitor"), select the key stage from the **Add New Status** drop down list, **Add Status Note** (if required), then click Submit.

Key Stages Ref: 000140/VET/2

Add New Status: Please select

Add Status Note:

Submit

Claim Received via Portal 2015/06/30 20:28

Activity desc.

The Activity Desc column shows the description of the last key stage (e.g. Emailed to Solicitor). Note: if text appears in blue then you can "hover" your mouse over the text to view the status notes.

Notes

Click on **View** in the Notes column to read notes/mark notes as read or submit a new note for that particular case.

Case Notes Ref: 000026/VET/ANDERSON

Add New Note:

Submit

2015/06/17 08:28

Please update us on Client contact

Docs

Click on **View** in the Docs column to view documents or submit a new document for that particular case.

Case Docs Ref: 000070/VET/COOPER

Document Title:

Upload New Doc (max 25MB): Browse... No file selected.

Submit

Guide (filetype .doc) 01/07/2015 11:36:48

SUBMIT A NEW CASE

Click on the button **Submit a New Case**. This will then take you to the Select case Type screen. Select the appropriate case type:-

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Case Management Portal

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[Portal Home](#) > [Select Case Type](#)

Select Case Type

Criminal Injuries Comp. Auth
Clinical Negligence
Employers Liability Disease
Employers Liability Accident
Public Liability
Road Traffic Accident (no PI)
Road Traffic Accident (with PI)

This will then take you to the Pre-Check screen which will check for duplicate cases already on the system:-

[Portal Home](#) > [Submit a New Claim \(Pre-Check\)](#)

Submit a New Claim (Pre-Check)

New Claim Pre-Check Details

Client Surname: *	<input type="text"/>
Client NI Number:	<input type="text"/>
Accident Date (yyyy/mm/dd): *	<input type="text"/>

Submit

Enter the Client's Surname, NI Number (if known) and Accident date then click on **Submit**.

If the pre-check was completed successfully, the following prompt will appear:-

Upload Claim From Excel...

Would you like to populate the claim detail from an Excel spreadsheet?

Upload Excel Form (max 25MB): * No file selected.

If you have used the standard Claim Form, click on Browse and select the excel spreadsheet and then click Yes. This will then pre-populate the case data for you. Otherwise, if you have used your own Claim Form then click No.

The Submit a New Case screen will be displayed and the Client Details section will be expanded and part populated from the pre-check above.

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Case pre-checks were completed successfully.

[Portal Home](#) > [Submit a New Case](#)

Submit a New Case

▼ Client Details	
Client Relationship:	Please select, if known ▼
Title:	Please select, if known ▼
Gender:	Please select, if known ▼

Scroll down to see the other sections (dependant on case type).

Note: For RTA cases, Passenger 1 Details will appear. Use the + Passenger button to add additional passengers. **Note: it is only possible to add Passengers before the case is submitted (not afterwards) as a separate case will be created for each passenger using the same accident details as the Client.**

Click on a section to expand the view to show the data.

Fill in as much data as possible, using the drop downs and calendars to assist with entering dates.

Once complete, click on the **Submit** button (at the bottom). This will then validate the data, displaying any errors found. Once the validation check is successful, the case will be submitted. An **Action item** will be automatically created for each item of missing "critical data". Examples are shown below:-

- Client Details – Client Address Line 1, Client Post Code, at least one Client Contact Number, Client Date of Birth, Client NI Number.

Once the data is entered, the **Action Item** for that missing "critical data" will disappear.

View Cases - Totals

There are two sets of totals at the bottom of the View Cases screen. The first set of totals 'Latest key Stage Totals', shows the number of cases currently at each Key Stage.

The second set of totals 'Full Totals', shows the number of cases that have reached a particular key stage.