Web Portal Guide for Introducers

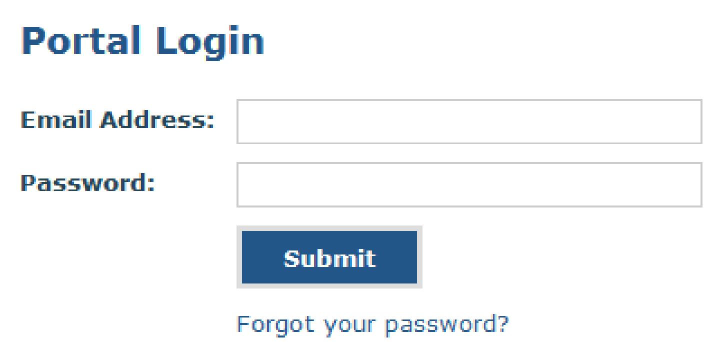
OVERVIEW

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:-

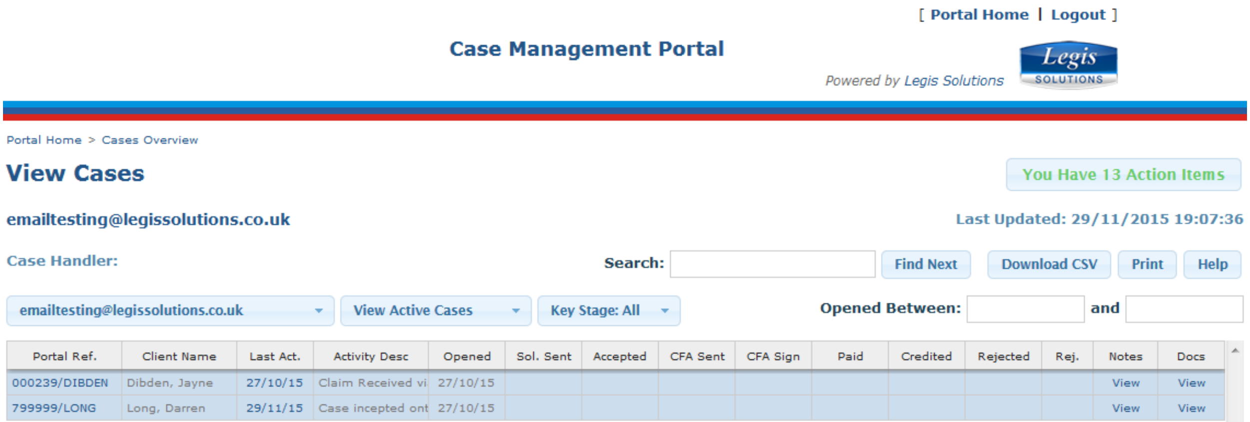


Click **Submit** or if you have forgotten your password, click on **Forgot your Password?** You will be emailed a new password. Once you have successfully logged in, you will see the **Portal Home** screen.

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

VIEW CASES

View Cases will display a multi functional screen.



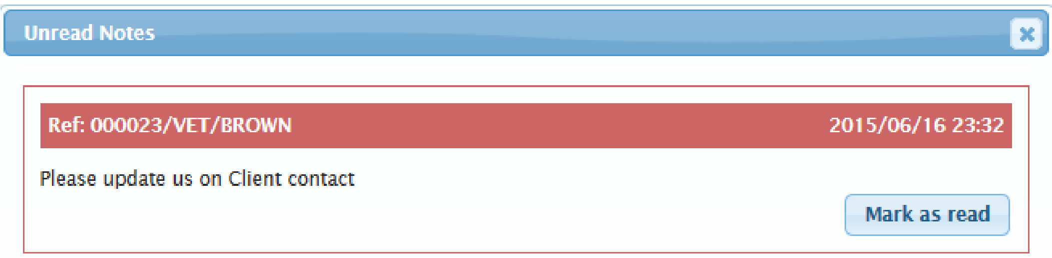
Alerts

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

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

Unread Notes

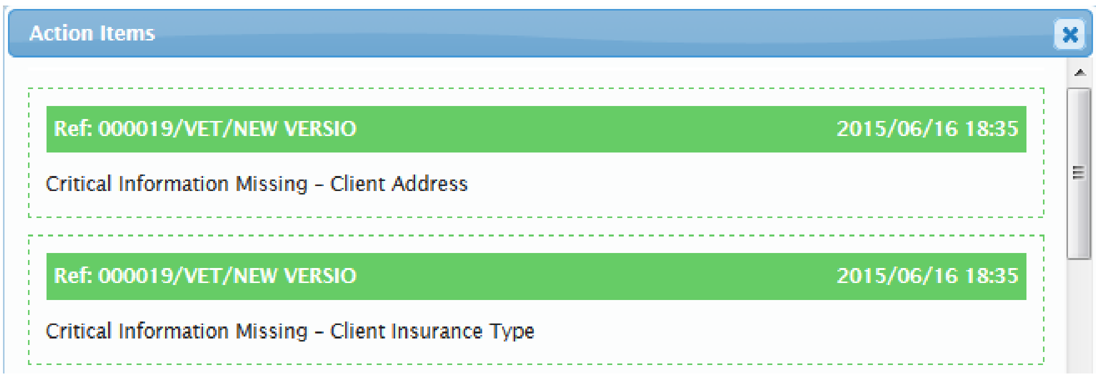
The button with red text will alert you to any “unread notes”. Click on the button to view those notes.



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.



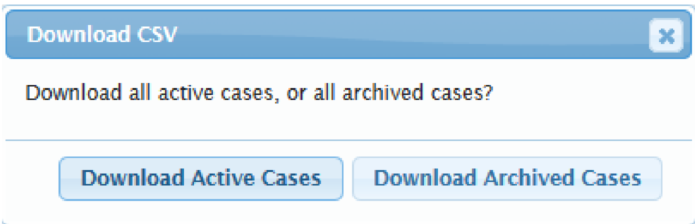
The **action items** will disappear as soon as the data is entered on the case (either via the Web Portal or via Legis Synergy Case Management).

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.

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**.

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)

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

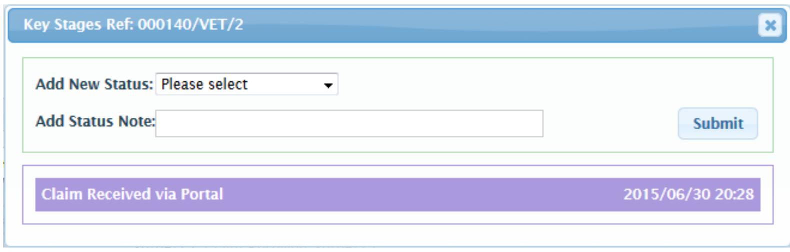
Click on a reference in the **Portal Ref** column to **Edit/View data** specific to that case.

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.



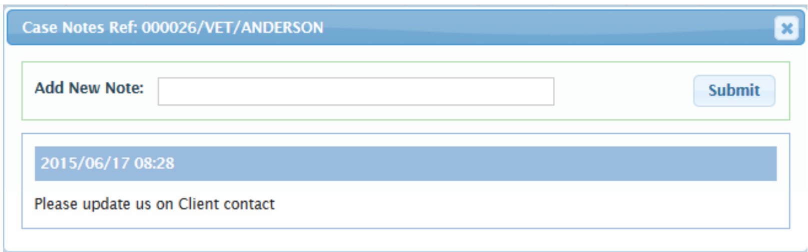
The Last Act. column shows the date of the last key stage - click on this date to view all key stages.

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.

Activity desc.

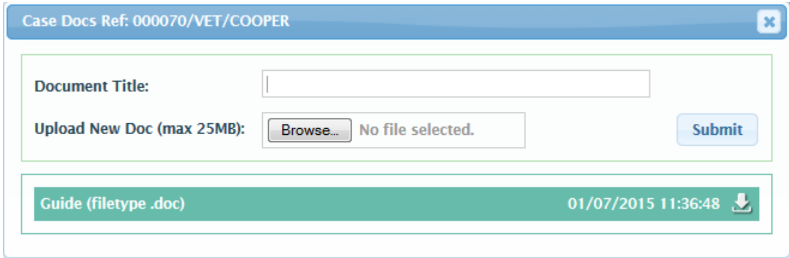
The Activity Desc column shows the description of the last key stage (e.g. Emailed to Solicitor). Note: if text appears in blue then you can "hover" your mouse over the text to view the status notes.

Notes



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

Docs

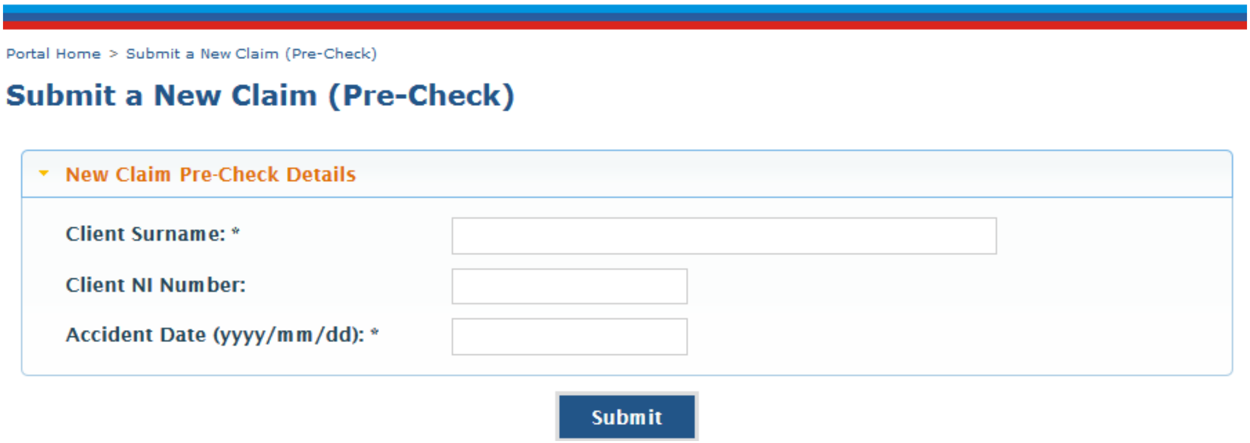


Click on **<u>View</u>** in the Docs column to view documents or submit a new document for that particular case.

SUBMIT A NEW CASE

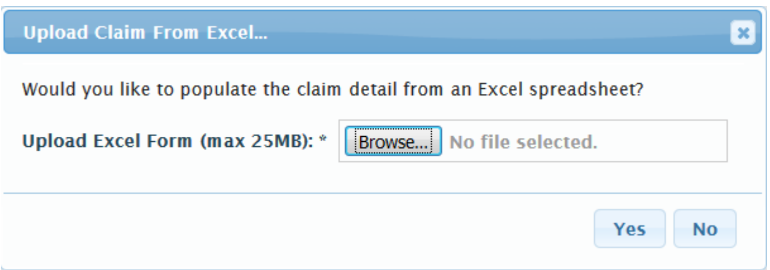
Click on the button **Submit a New Case**. This will then take you to the Select case Type screen. Select the appropriate case type:-

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



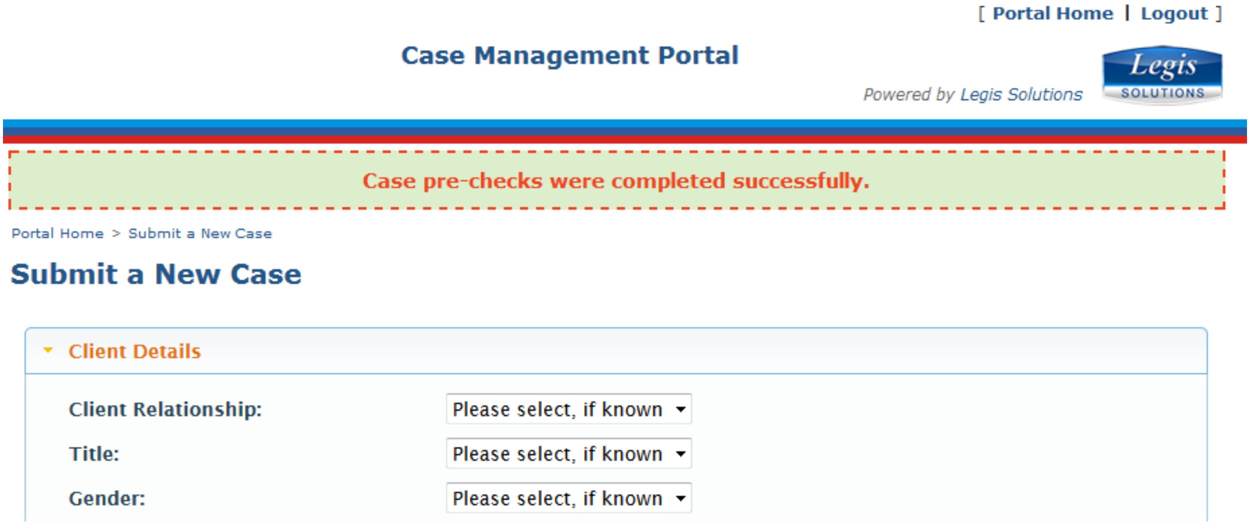
Enter the Client's Surname, NI Number (if known) and Accident date then click on **Submit**.

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



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.



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.