

How to change the Case details for a client.

Open the client.

- ▶ Consent
- ▶ Client Category ⓘ
- ▶ Risk Assessment and Communications Actions ⓘ
- ▶ Referral
- ▶ Unsuccessful Referrals ⓘ
- ▶ Criminal Justice Details
- ▶ Release Dates ⓘ
- ▶ Other Details

to change any of the details in this section of the Case Details, e.g. the release date or to add a risk assessment.

V: 26.1 | Home | New Case | Search | Reports | Adminis

Your Location: Home > Client > Case

Case Tasks

- Edit details**
- Delete case
- Reassign
- Add note
- Add security permission
- Set responsibilities
- Schedule review
- Review case

Status Tasks

- Close
- Referral

Case Details

Chaplaincy: Comr

Summary

Reference

Open Date

Status

Creator

Owner

Description

Partnership

- ▶ Consent
- ▶ Client Category
- ▶ Risk Assessment a

Click on Edit details, this will open the above list as a list with drop down boxes for each of the topics.

When you are finished with your edits, DON'T FORGET TO CLICK SAVE. This is located at the bottom left-hand side of the page.