

# Case Management Module Settings

## EPM Connect Guide



# Document Control

**Document Overview:** This document outlines the step-by-step process for managing the settings within Case Management.

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## Document Approval

The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23<sup>rd</sup> October 2025 and is issued on a version-controlled basis under her signature.

## Document History

<b>Date of Change</b>	23 <sup>rd</sup> October 2025
<b>Summary of Change</b>	Changes to improve clarity
<b>New Version Number</b>	v2.0
<b>Changes to be notified to</b>	Director of Operational Excellence

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## General Guidance

You can edit any fields by clicking on the  or delete by clicking on the  and can fully customise them as you move forward, editing at any time.

If the field is currently not being used in the system you can remove it by clicking , however if it is currently being used by a candidate you cannot remove it but will be able to in the future.

## Statuses


This tab allows you to set Statuses that can be assigned to cases and appeals.

Statuses can be set on the edit pages for cases and appeals.

1. On the left-hand side of the system window, click **Case Management**. A list of further menu options is displayed.
2. Click **Settings**. The **Settings** page is displayed.
3. Select the **Statuses** tab. The tab information is displayed.

### Case Statuses

1. Click the **+ Create Case Status** button.

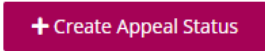


2. In the **Title** text box, enter a title.
3. Click **Save** to finish.



### Appeal Statuses

1. Click the **+ Create Appeal Status** button.



2. In the **Title** text box, enter a title.
3. Click **Save** to finish.



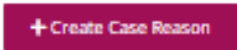
## Reasons

This tab allows you to set Reasons that can be assigned to cases and appeals.

1. On the left-hand side of the system window, click **Case Management**. A list of further menu options is displayed.
2. Click **Settings**. The Settings page is displayed.
3. Select the **Reasons** tab. The tab information is displayed.

### Case Reasons

1. Click the **+ Create Case Reason** button.

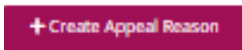
A rectangular button with a dark blue background and white text that reads "+ Create Case Reason".

2. In the **Title** text box, enter a title.
3. Click **Save** to finish.

A rectangular button with a dark blue background and white text that reads "Save".

### Appeal Reasons

1. Click the **+ Create Appeal Reason** button.

A rectangular button with a dark blue background and white text that reads "+ Create Appeal Reason".

2. In the **Title** text box, enter a title.
3. Click **Save** to finish.

A rectangular button with a dark blue background and white text that reads "Save".

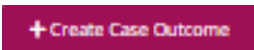
## Outcomes

This tab allows you to set Statuses that can be assigned to cases and appeals.

1. On the left-hand side of the system window, click **Case Management**. A list of further menu options is displayed.
2. Click **Settings**. The Settings page is displayed.
3. Select the **Outcomes** tab. The tab information is displayed.

### Case Outcomes

1. Click the **+ Create Case Outcome** button.

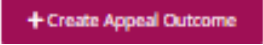
A rectangular button with a dark blue background and white text that reads "+ Create Case Outcome".

2. In the **Title** text box, enter a title.
3. Click **Save**

A rectangular button with a dark blue background and white text that reads "Save".

## Appeal Outcomes

1. Click the **+ Create Appeal Outcome** button.

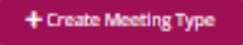
A rectangular button with a dark blue background and white text that reads "+ Create Appeal Outcome".

2. In the **Title** text box, enter a title.
3. Click **Save**

A small rectangular button with a dark blue background and white text that reads "Save".

## Meeting Types

1. On the left-hand side of the system window, click **Case Management**. A list of further menu options is displayed.
2. Click **Settings**. The Settings page is displayed.
3. Select the **Meeting Types** tab. The tab information is displayed.

A rectangular button with a dark blue background and white text that reads "+ Create Meeting Type".

4. In the **Title** text box, enter a title.
5. Click **Save**

A small rectangular button with a dark blue background and white text that reads "Save".