Core Case Management Module

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Core Case Management Module in EPM Connect.

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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 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23rd October 2025
Summary of Change	Changes made to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Case Management Module

The Case Management module contains all the information you may need with regards to your school or Trust's casework. Here, you can view all details and documents related to current cases, meetings and appeals, plus a summary and metrics to support you analysing patterns and trends to inform your HR Strategy.

Summary

The Case Management summary page gives an overview of the cases associated with the school that have been recorded within the EPM Connect system for the current academic year. To view this, click on **Case Management** on the left-hand side of the EPM Connect window. From the menu displayed, select **Summary**.

To view more details, click the arrow in the top right of any of these metrics to move into specific details.

Reporting

Reports relating to **Case Management** can be viewed by clicking on the **Reports** button at the top of the screen within the **All Cases** page.

Cases

View a Case

View all current cases and associated documents. All cases will be created by your EPM HR Team.

1. On the left-hand side of the EPM Connect window, click on **Case Management**. The **Case Management** menu is displayed.
2. From the **Case Management** menu, select **Cases**.
3. From the sub-menu displayed, select **All Cases**. The **All Cases** page is displayed, with three tabs available: **Open Cases**, **Closed Cases** and **All Cases**.
4. Select the tab you need.
5. Find the case you want to view.

   Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

   To search in a column, click on the magnifying glass in the header of the column you want to search. From the for drop-down list, select the rule for your search then add the criteria in the text box below.

6. To view the case, click on either the **ID** number in the first column or the eye icon in the right-hand column. The **View Case** page is displayed.
7. The following tabs are available:
   - **Visibility**: which users and user groups are able to view the case. Regardless of other permissions within the system, only users who have been granted visibility, will be able to view the case.
   - **Appeals**: any appeals linked to the case.
   - **Meetings**: any meetings linked to the case.
   - **Documents**: any documents linked to the case.
   - **Notes**: any notes relating to the case.
   - **Audit Trail**: an audit trail of any action taken on the case within the EPM Connect system, including each time the case was viewed.

Appeals

View an Appeal

View any appeals raised against the outcome of a case. All appeals will be added by your EPM HR Team.

1. On the left-hand side of the EPM Connect window, click on **Case Management**. The **Case Management** menu is displayed.
2. From the **Case Management** menu, select **Appeals**.
3. From the sub-menu displayed, select **All Appeals**. The **All Appeals** page is displayed, with three tabs available: **Open Appeals** and **Closed Appeals**.
4. Select the tab you need.
5. Find the appeal you want to view.

   Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

   To search in a column, click on the magnifying glass in the header of the column you want to search. From the for drop-down list, select the rule for your search then add the criteria in the text box below.

6. To view the appeal, click on either the **ID** number in the first column or the eye icon in the right-hand column. The **View Appeal** page is displayed.
7. The following tabs are available:
   - **Visibility**: which users and user groups are able to view the appeal. Regardless of other permission within the system, only users who have been granted visibility, will be able to view the appeal.
   - **Meetings**: any meetings linked to the case.
   - **Documents**: any documents linked to the case.
   - **Notes**: any notes relating to the case.
   - **Audit Trail**: an audit trail of any action taken on the case within the EPM Connect system, including each time the case was viewed.

Meetings

View a Meeting

View any meetings recorded as part of a case. All meetings will be recorded by your EPM HR Team.

1. On the left-hand side of the EPM Connect window, click on **Case Management**. The **Case Management** menu is displayed.
2. From the **Case Management** menu, select **Meetings**.
3. From the sub-menu displayed, select **All Meetings**. The **All Meetings** page is displayed, with two tabs available: **Upcoming Meetings** and **Previous Meetings**.
4. Select the tab you need.
5. Find the meeting you want to view.

   Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

   To search in a column, click on the magnifying glass in the header of the column you want to search. From the for dop-down list, select the rule for your search then add the criteria in the text box below.

6. To view the case, click on either the **Meeting Title** or the eye icon in the right-hand column. The **View Meeting** page is displayed.
7. The following tabs are available:
   - **Visibility**: which users and user groups are able to view the meeting. Regardless of other permission within the system, only users who have been granted visibility, will be able to view the meeting details.
   - **Documents**: any documents linked to the meeting.
   - **Notes**: any notes relating to the meeting.
   - **Audit Trail**: an audit trail of any action taken on the case within the EPM Connect system, including each time the case was viewed.