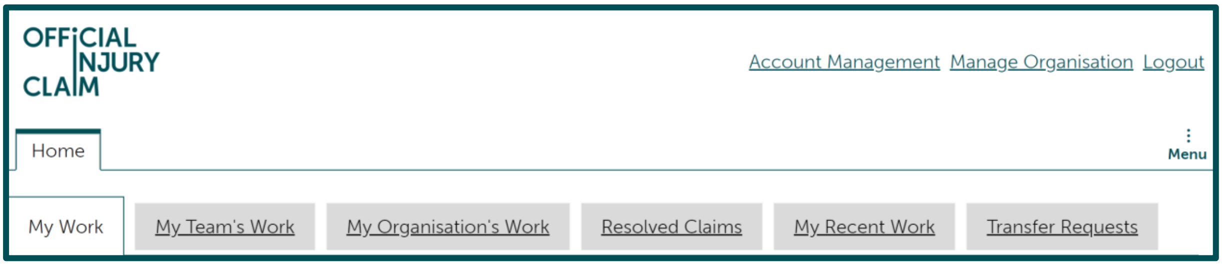
Managing an Organisation

OFFICIAL INJURY CLAIM

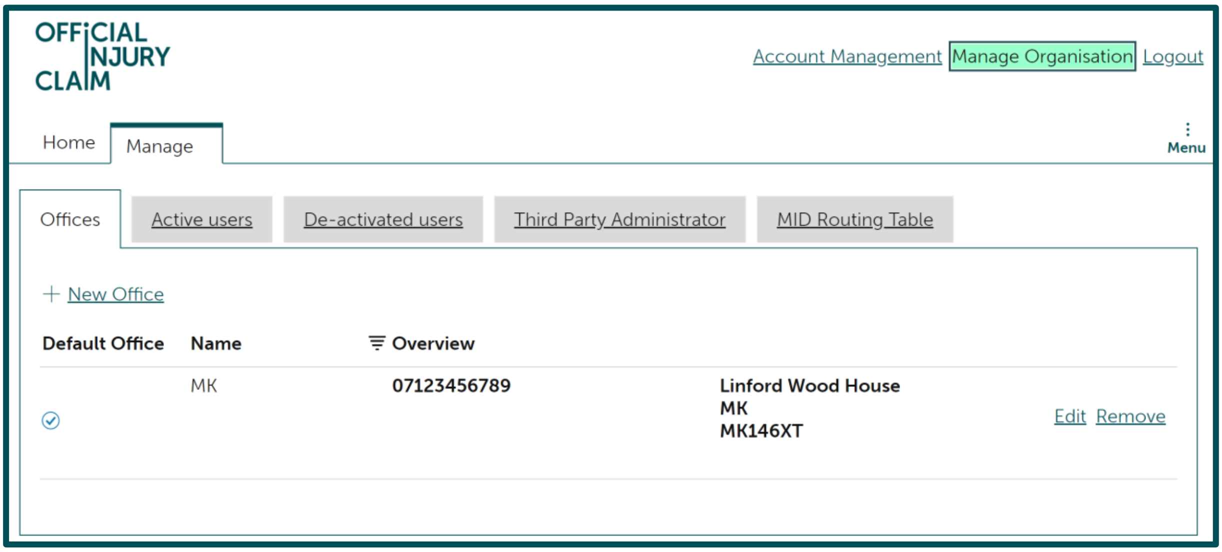
Contents

Creating Offices

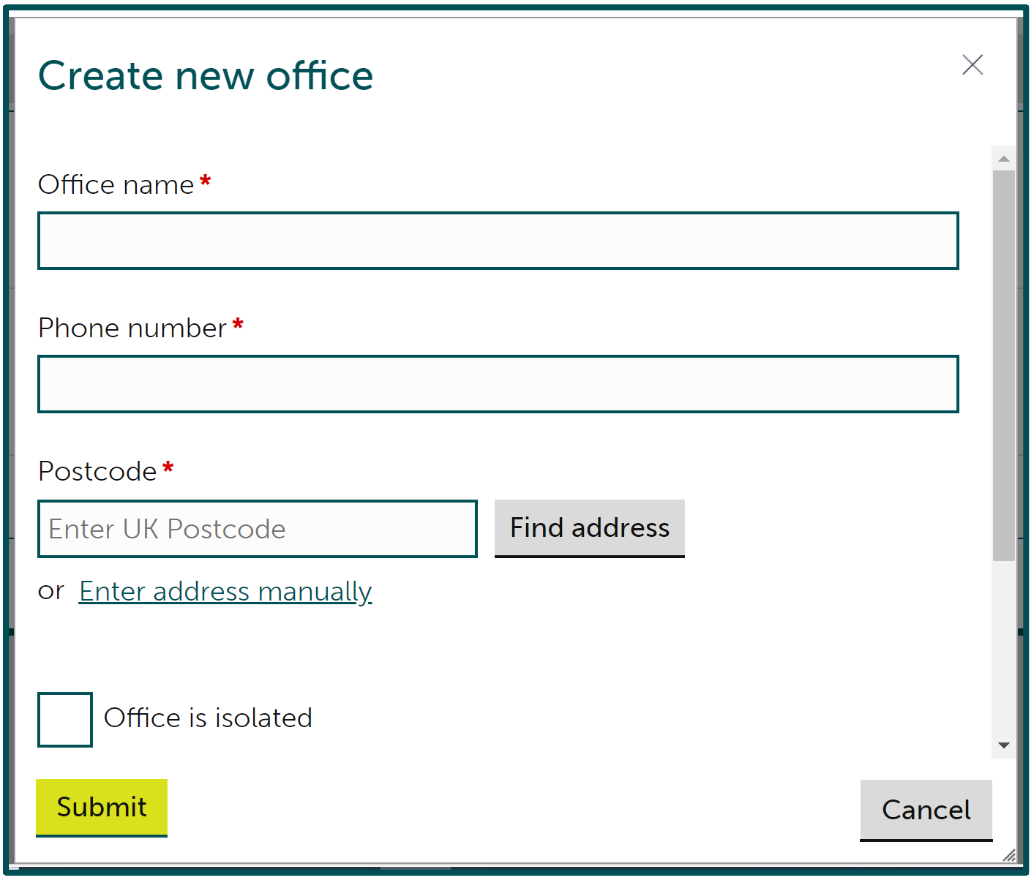
Organisation administrators will have the below link to the ‘Manage Organisation’ section, to begin to manage the offices, select this.



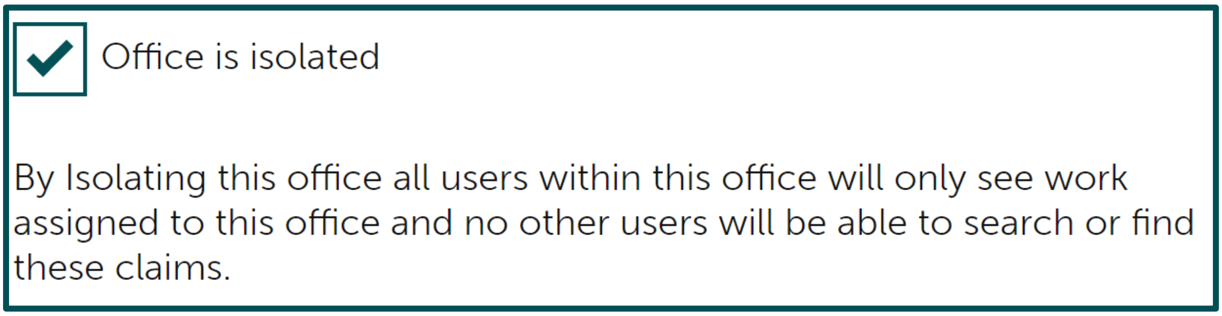
Upon clicking ‘Manage Organisation’ the below screen will show with any current offices registered to your organisation. To add a new office, select ‘New Office’ as shown below.



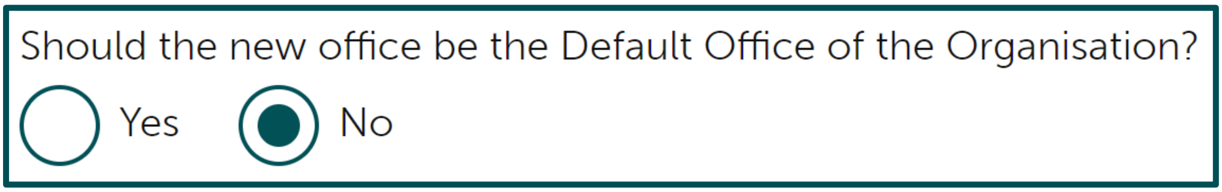
Upon clicking ‘New Office’ the below screen will appear. Here you can add the necessary details.



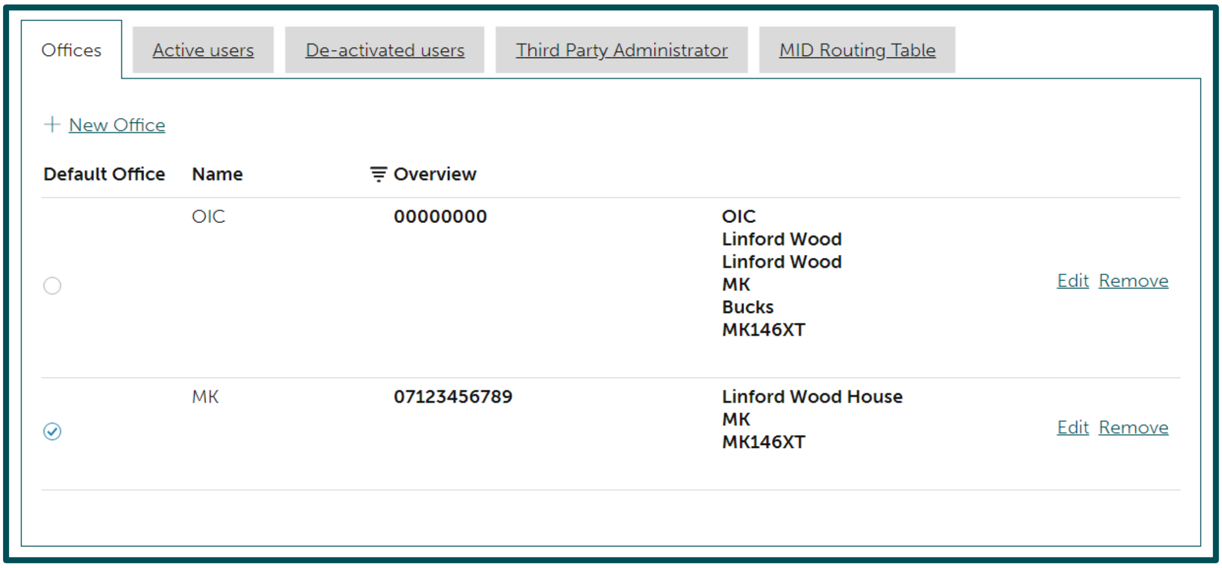
If you require the users within this office to only see claims assigned here, you can select the office to be isolated.



You will be asked if you wish for this office to be the default office of the organisation. Default offices can be changed at any time in the 'Manage Organisation' section under the 'Office' tab.

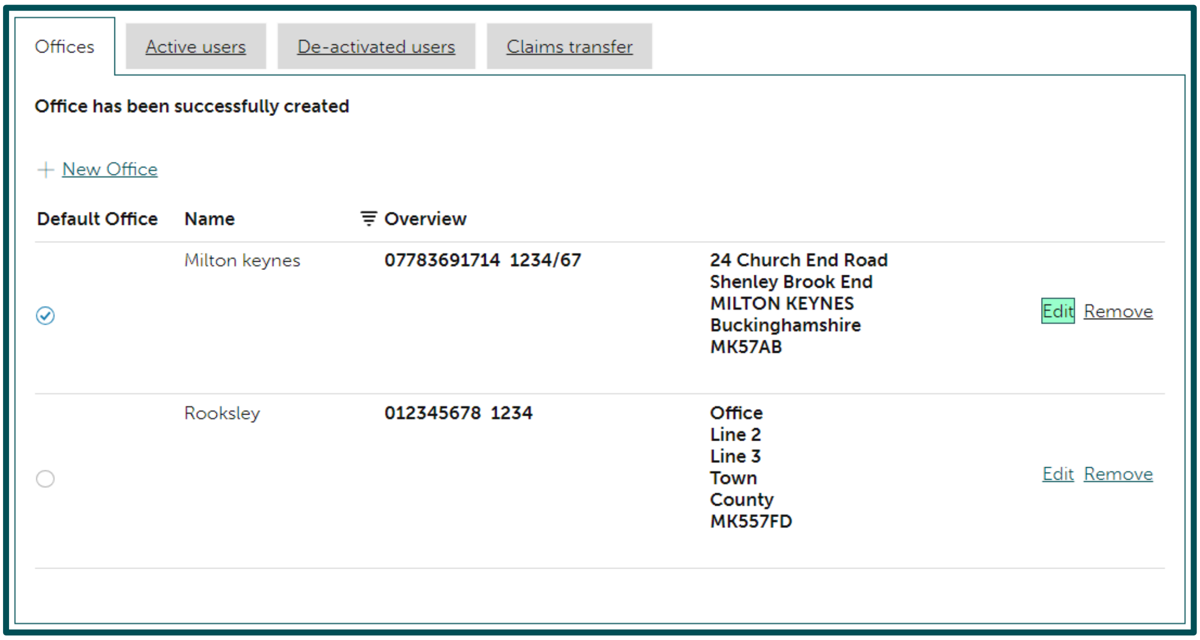


The new office will then show in the 'Offices' tab.

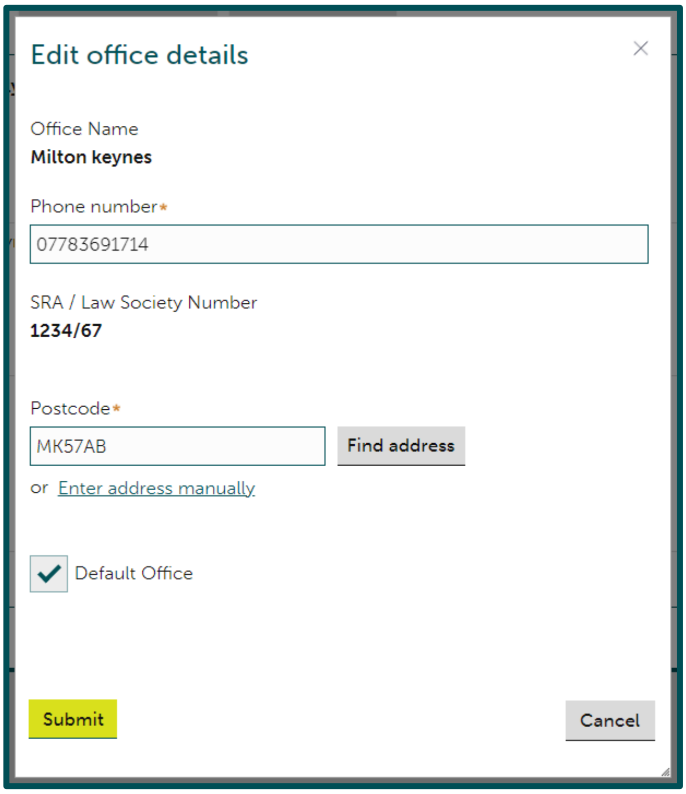


Editing an office

To edit an office, you will need to select the ‘Edit’ link on the right side of the table.

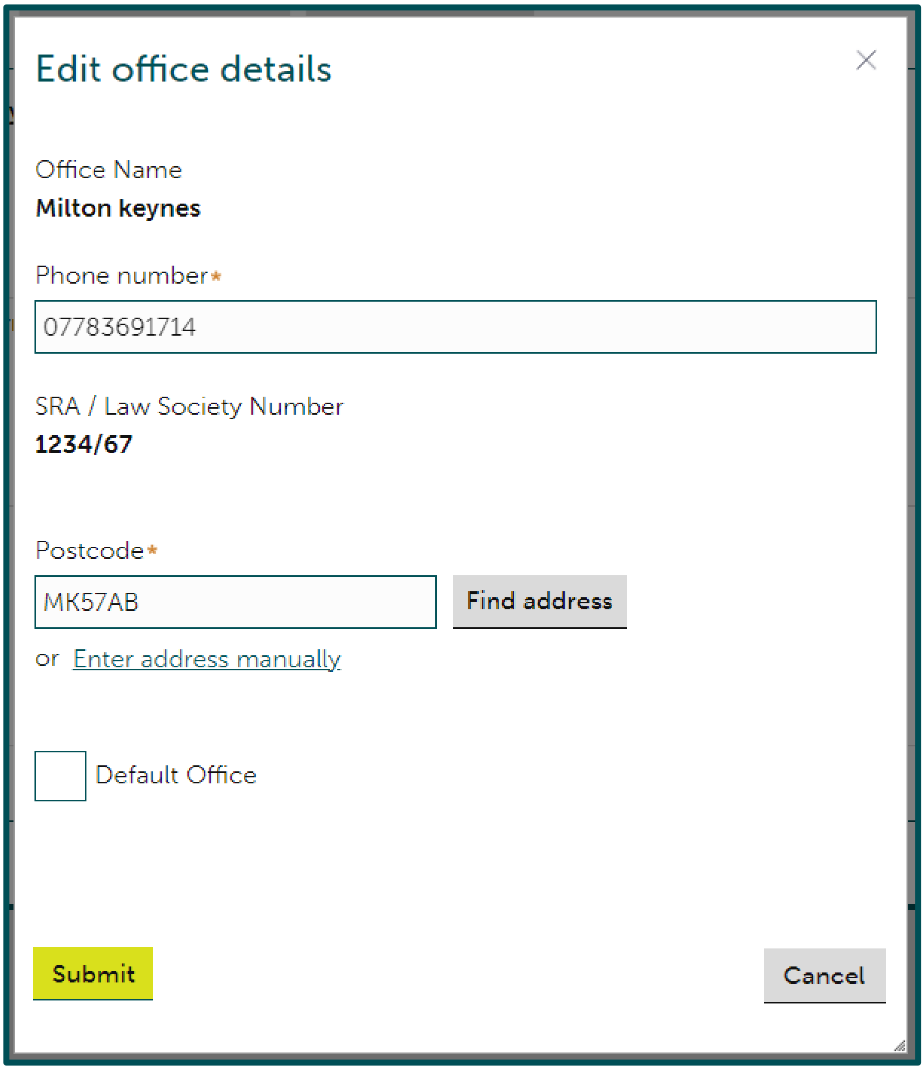


This will open a pop-up which will allow you to edit the office number and address, you are unable to edit the Office Name or SRA / Law Society Number (applicable to pro-users only). If this needs to be amended, you will need to add a new office.



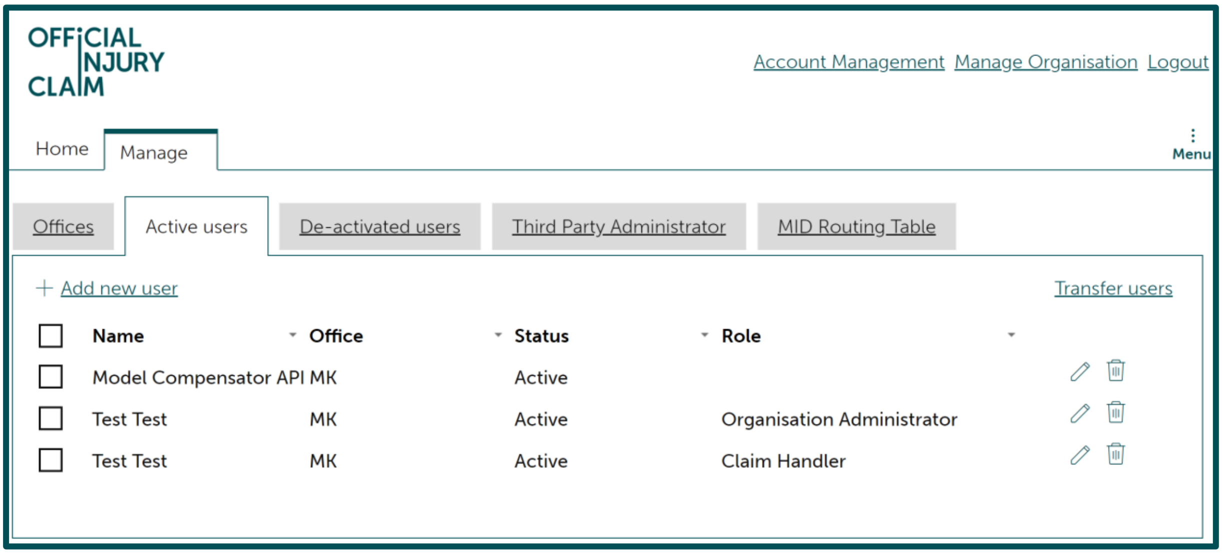
Please note the system will use the address for the default office to populate documents. For compensators, the default office details will be presented to the claimant for contact information.

To amend the default office, you will need to edit the desired default office and check the ‘Default Office’ checkbox. If the office selected is the default office, this box will be checked.

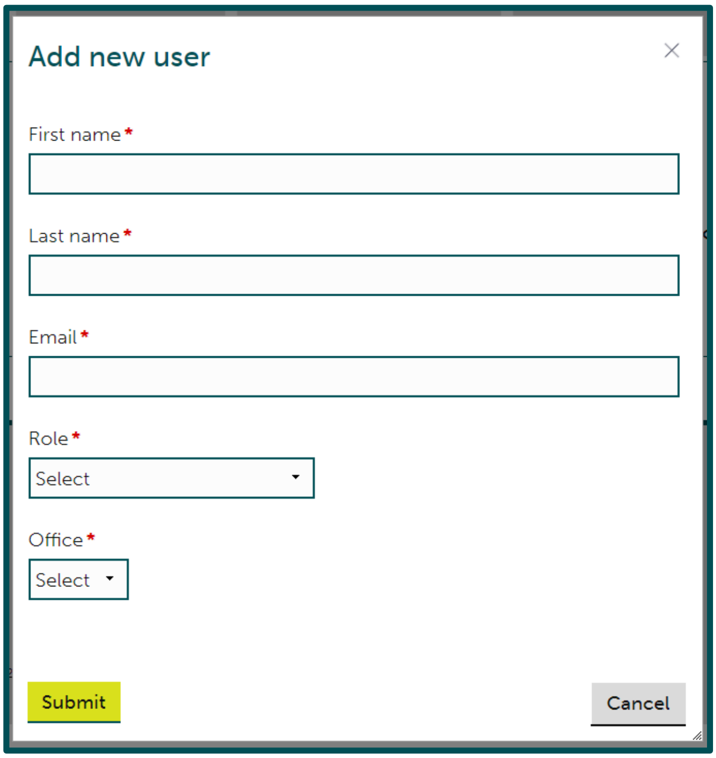


Adding a new User

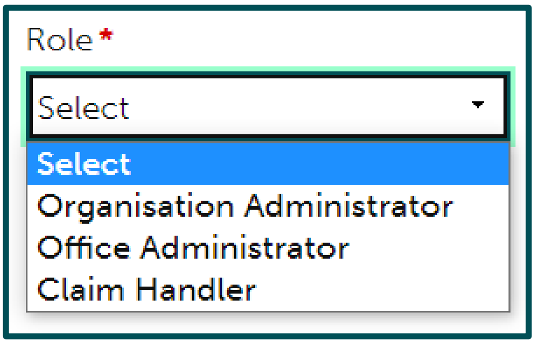
In the Manage Organisation section, you can manage users under the ‘Active users’ tab. This function is available to Organisation Administrators and Office Administrators. To edit a user, you can select the pencil icon on the right of the user, to deactivate the user, you will need to select the bin icon.

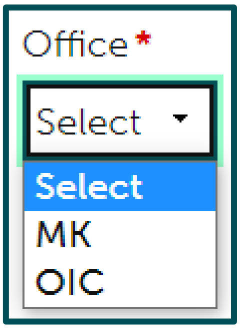


To add a user, you can select ‘Add new user’ which will bring up the below screen.



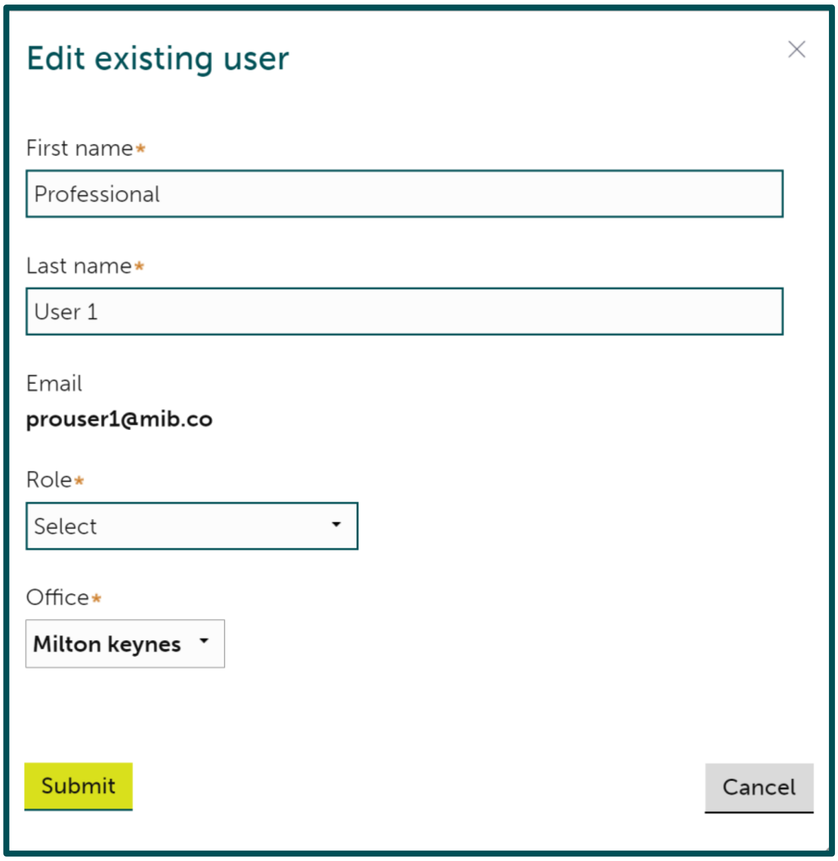
Here you can select their role and which office you would like to assign the user to. The dropdown will show any offices that have been added to the organisation.





Editing a User

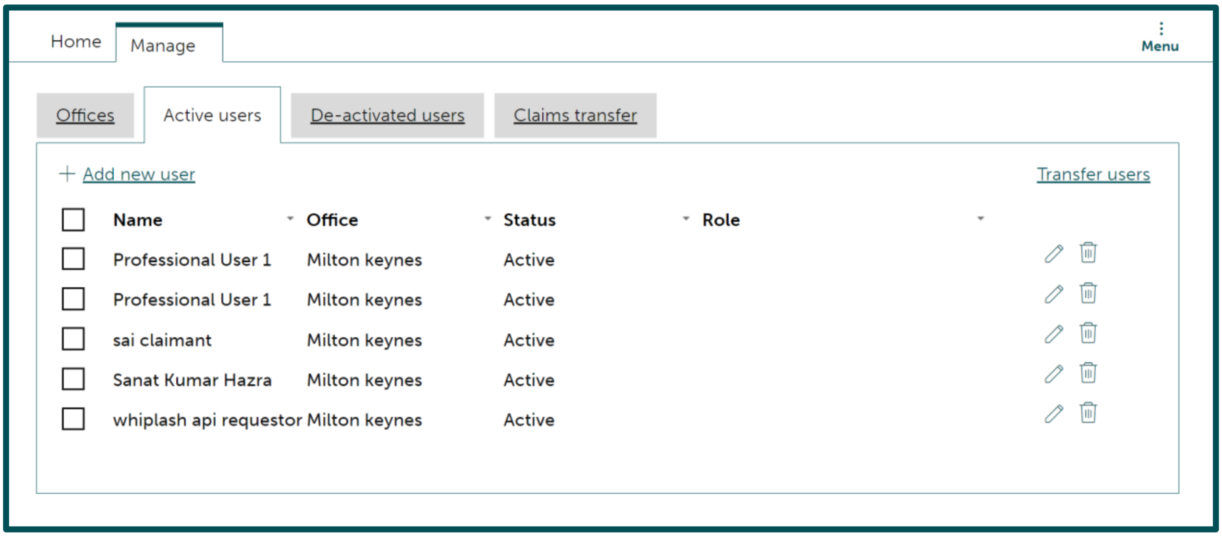
Editing the user works similarly to the above. You can amend the first and last name of the user as well as change the office in which a user is assigned to and amend their role. You cannot change the email address assigned to a user.



Should the email address need to be amended for a user, a new user entry will need to be added with the correct email address.

Deactivating/Reactivating a User

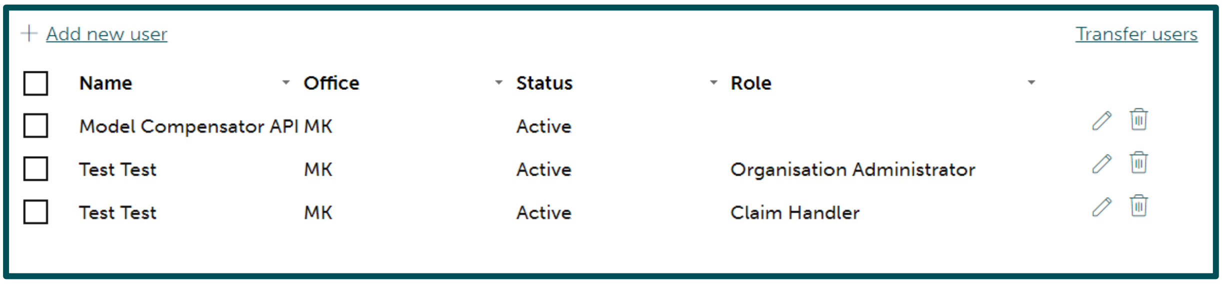
Where a user needs to be deactivated, for example if they have left the business. You can remove a users ability to access the service within your organisation by deactivating them. To do this the bin icon on the far right should be selected.



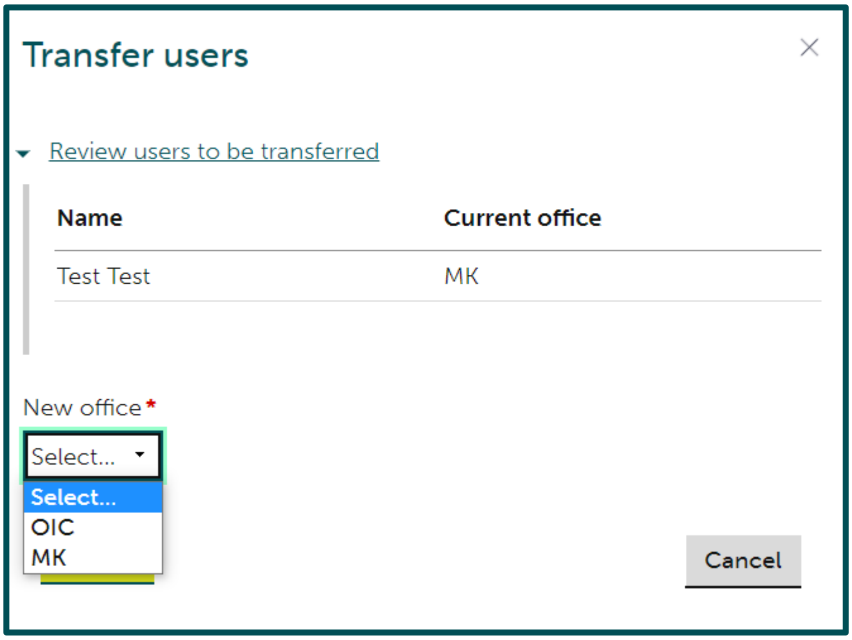
Once

Transferring Users between Offices

You can also do this as a bulk action by checking the tickbox of the users you wish to transfer and selecting ‘Transfer users’.



You will then see the below screen which will show the users selected and allows you to select the office you wish to transfer them to.



Once they have been transferred the office column will show which office the user is currently assigned to.

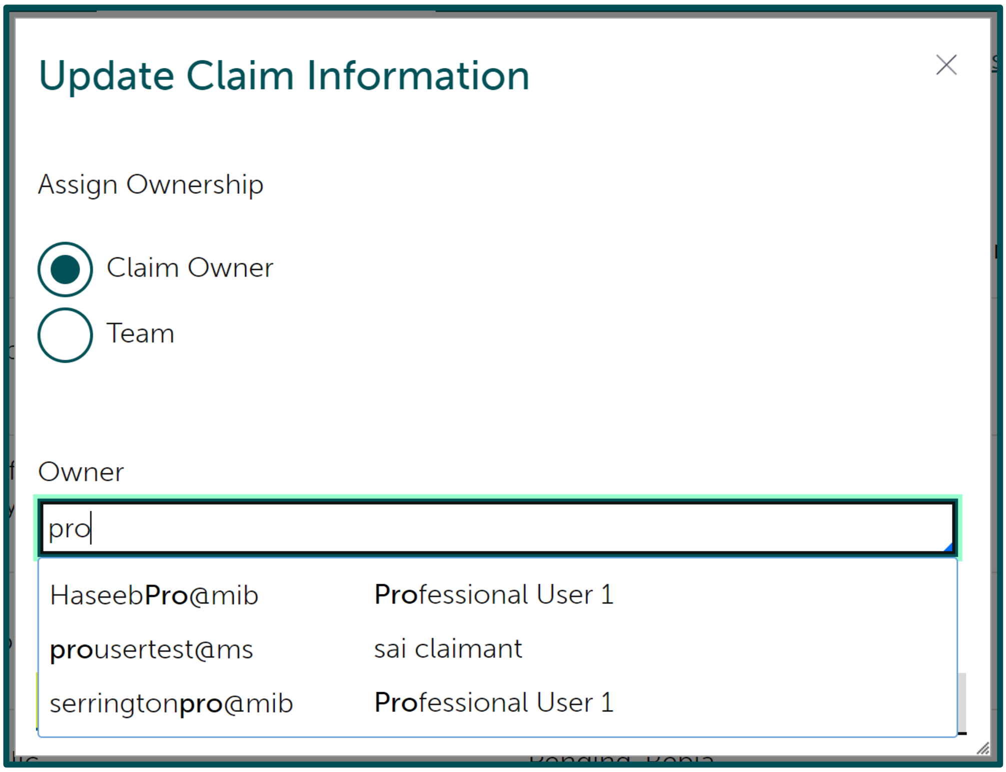
+ Add new user

	Name	Office
☐	Model Compensator API	MK
☐	Test Test	OIC
☐	Test Test	MK

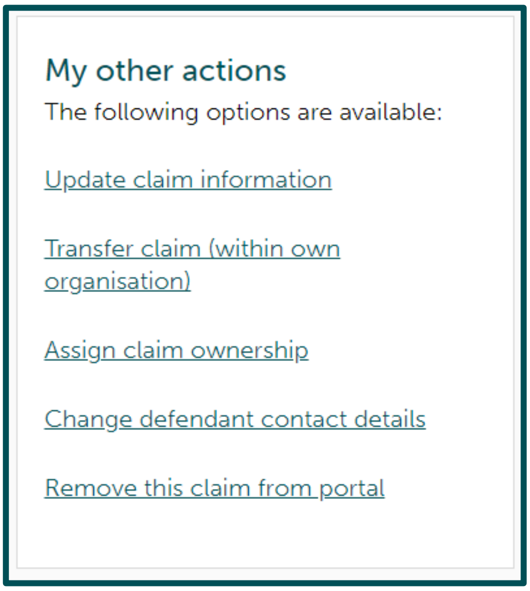
Transferring a Claim between Users

To transfer claims to another office, you can do so by checking the tickbox on the left for the necessary claims, then selecting 'Bulk actions'.

This will bring up the below screen where you can select the claim owner option to transfer between users. You can then use the text box provided to enter the name of the user you wish to assign claim ownership to and select them from the drop down before pressing 'Submit' to confirm.



This can also be done within a claim on the 'Claim overview' screen under 'My other actions'. Using the 'Assign claim ownership link.

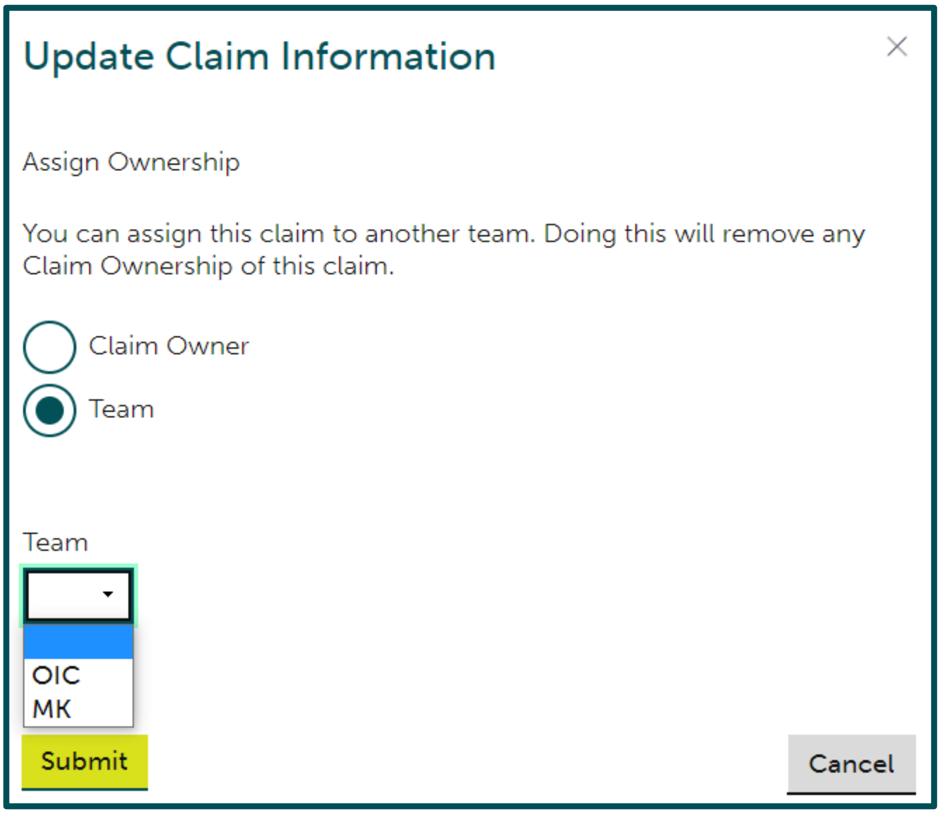


Upon clicking this link, you will be presented with the below pop up, where you can clear the claim owner or select a new one from the box provided. Selecting 'Finish' will save these changes.

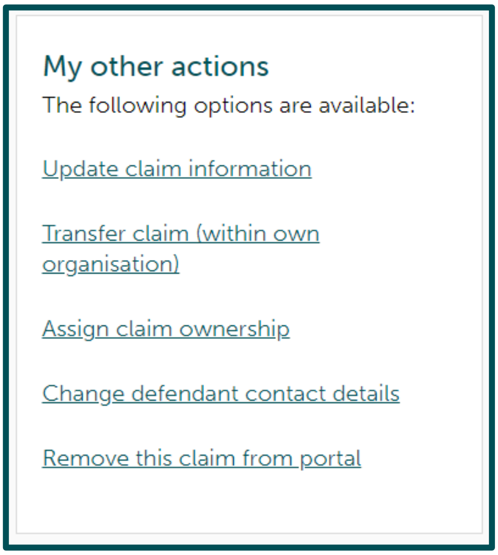
Transferring a Claim between Offices

To transfer claims to another office, you can do so by checking the tickbox on the left for the necessary claims, then selecting ‘Bulk actions’.

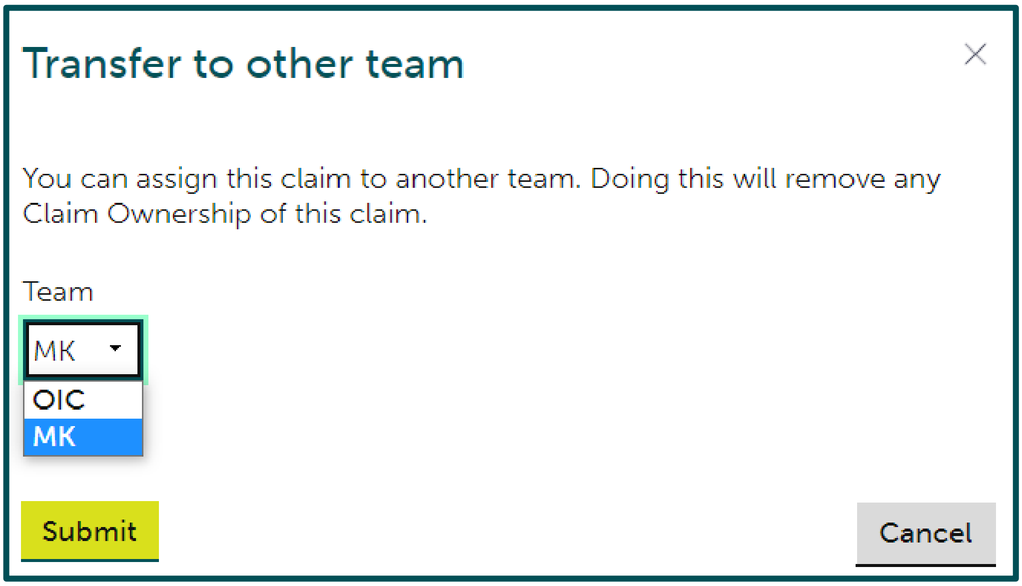
This will bring up the below screen where you can select the team option to transfer between offices and select which office you would like to assign the claim to from the dropdown menu.



Claims can also be assigned to offices by opening up the claim to the 'Claim overview' page and heading to the 'My other actions' section where you can select 'Transfer claim (within own organisation)'



Upon clicking 'Transfer claim (within own organisation)' the below screen will appear, this is where the user can change the office in which the claim is assigned to.



You can also filter to see which claims are assigned to which office by selecting ‘Show filters’ and filtering by ‘Organisation’s team’. Users assigned to offices can see the work allocated to their office by selecting the ‘My Team’s Work’ tab.