CASES LIST VIEW

Search...

Attendance | Cases ❶ | ∨ ❷ 💼 00002094 | Case ∨ ✕

⭐ ∨ ➕ ⛅ ❓ 🔔²⁰⁺ ❽ 👤 ❾

Cases

🗂️ **All Open Case** ⊙ 📌 ❹

2 items • Sorted by Case Number • Filtered by Date/Time Opened, Closed, Student Name • Updated 24 minutes ago

7. Favourites
Create favourites for regularly used cases, reports and dashboard ❼

8. Notifications
See in-app notifications related to cases

9. Your profile
Change your password & log out

1. Cases tab
This tab shows the cases your organisation manages

2. Selection list
Use this arrow to switch between your homepage, list views of cases, reports and other options

Assign

Q Search this list... ⚙️∨ ❿ ⊞∨ ⓫ ↻ ↑↓ ✏️ ⓬ ◔ ⓭

		Case ... ↑ ∨ ⓮	Student ∨	Type ∨	Contact Name ∨	Status ∨	Priority ∨
1	☐ ❸	**00002107**	Thomas Harris	Non Enrolled	Auckland Grammar Primary Contact	CIT Queue	Medium	⊙
2	☐	**00002124**	Darren Harris ❺	Chronic Absence	Auckland Grammar Primary Contact ❺	Provider Queue	Medium	⊙

3. Select cases
Select one or more cases, then click the 'Assign' button to assign them

4. List view selector
Choose the list view you want to see. Pin a list to make it your default view

5. Contact links
Click to see more details about that person or organisation

6. Global Search
Search for a phrase and see results from all records in the system

10. List view settings
Create a custom list view. Change columns and add filters in that view

11. List display settings
Choose a view setting, including a split-screen view

12. Assign button
Click to assign one or more *selected* cases

14. Sort
Click the column header text to sort the list view. An arrow will show if the column is sorted. Click the header again to flip the sort order

13. Filters
See what filters have been applied and add new filters to change what is shown in a custom list view

THE CASE TAB

🧳 00002094 | Case ❶ ∨ ✕

1. Case tab
Each new case opens in a new tab

Case
00002094

❷

Student	Student Age	Status	Type	Case Owner	Current School Catchment
Tyler Rees	13 years	Closed	Chronic Absence	Attendance Ronil ASP Case manager	Wellington City

❻

6. Key details
This shows important information at a glance

| Paused | CIT Queue | Filter | Provider Queue | Open | Transition | Closed ❽ |

⚡ Action Launcher ❺

🔍 Search actions...

[Allocate Case] [Assign Case Owner] [Update Status] [Add Case Comment] [Upload File] [Add Event] [Add Task] [Send Email] (▼)

🔔 Alerts (0) ❼

7. Alerts
Shows risk factors or concerns to be aware of when engaging with the student or whānau

8. Status indicator
See the current case status

📇 Student Details ❸ (▼)

This setting comes from ENROL, if legal or other concerns make it critically important to protect the student's ...

Keep Private	false ❹	Enro...
Currently Enrolled		Gen...
Student known as	Aro	Curr...
Date of birth	31/10/2012	Iwi

9. Contacts
See whānau contacts in the *Key* tab. And the school primary contact in the *School* tab

❾

Contacts

2. Case number
Add this number to the *Global search* to find the case

3. Student details
Key details recorded in the system about the student. Click the *Student Details* heading to see the student's profile

4. Keep private setting
This setting comes from ENROL, if legal or other concerns make it critically important to protect the student's information

5. Action launcher
Complete common tasks using the buttons. Some actions are hidden, so use *Search actions*...to find them

| Key | **School** |

School Primary Contact is your contact person at the school for this case. The primary contact has access to some content in this case record and can only be updated by the school. Use Caregivers & Other contacts to record other contacts.

📇 Primary Contact (▼)

Name		Name
Attendance School Contact (885) ✏		School 885 ✏
Email		Phone
graham.morley@education.govt.nz ✏		12121212 ✏
Contact Notes		
		✏

Timeline

Interactions ▼

All Events • Most Recent Event

This section is covered on the next page

Upcoming

> 📅 **Transition Meeting**   28 November 2025 (▼)

Past

Attendance | Cases | 🧳 00002094 | Case | ❌ **①**

1. Case tab
Each new case opens in a new tab

② Activity | Details | Related | Enrolment History | Support Requests
④ **⑤** **⑥** **⑦**

Timeline

Interactions ▾

All Events • Most Recent Event

Upcoming

> 📅 **Transition Meeting**

2. Activity Timeline
This shows case updates & records that have been added to the case. Click the arrows or hover over the entry to see more information

3. Timeline action buttons
Use these to edit or delete items in your timeline. Not all entries can be edited or deleted.

③ 🔄 🗓 🔽 ⇅

Past

> ✉ **00002094 - Chronic Absence Case has been Closed**
graham.morley@education.govt.nz

28 November 2025 🔽

> 📅 **Reallocation Handover Meeting**

31 October 2025 🔽

> ✉ **An Attachment has been added to Case:00002094**
graham.morley@education.govt.nz

31 October 2025 🔽

29 October 2025 🔽

> ✅ **Call Mrs Tui and Check Carpooling plan**

29 October 2025 🔽

> ✉ **A new Case Comment has been added to Case: 00002094**
graham.morley@education.govt.nz

29 October 2025 🔽

4. Details
This tab contains additional case information such as the Not Located flag

...il transport issues due to bus route changes. She's exploring carpool options.

29 October 2025 🔽

...nt has been added to Case: 00002094
...ation.govt.nz

29 October 2025 🔽

5. Related tab
This tab holds case *Comments, Emails* and *Files*

...updated and shared with the ākonga.

29 October 2025 🔽

6. Enrolment History
Shows the schools the student has been enrolled in

7. Support requests
A list of supports requests that have been made for the student

28 October 2025 🔽

...k t

28 October 2025 🔽

28 October 2025 🔽

...Send quote

> ✉ A new Case Comment has been added to Case: 00002094

28 October 2025 🔽

School Primary Contact is your contact person at the school for this case. The primary contact has access to some content in this case record and can only be updated by the school. Use Caregivers & Other contacts to record other contacts.

Contacts are covered on the previous page

🆔 Primary Contact

Name	Name
Attendance School Contact (885) ✏	School 885 ✏
Email	Phone
graham.morley@education.govt.nz ✏	12121212 ✏
Contact Notes	

✏

Service Coordination

⑧ Plans | Services | UBNF | Barriers | **Info Requests**
⑨ **⑩** **⑪** **⑫**

✅ **Information Requests**

8. Plans
Where tailored student support plans are created & listed

10. UBNF
To record the use of the Unmet Basic Needs Fund

11. Barriers
Where barriers to attendance are entered and listed

Date:

9. Services
Where agencies or services that are supporting the student are shown

12. Info requests
See requests made to other government agencies to locate the student/whānau

...h Re

...5

- Task - Immigration (

Created Date: 28/10/2025