



# CIVICA

## Private Practice Training → Case Agenda Driven Operator

### ➤ Who will the course benefit?

At least one Supervisor/Fee Earner, as changes to current working methods may be required, plus any staff that will be using the package.

### ➤ Pre-requisites

Attendees should have basic keyboard skills.

### ➤ Course reference

8LEG010

### ➤ Duration

One day.

### ➤ Further information

For additional information on this course or any other training issue please e-mail [training@civica.co.uk](mailto:training@civica.co.uk)

### ➤ Course objectives

The course will cover in depth all aspects of the operation of the Case processing product for Agenda Driven case types.

#### 1. Introduction

- a. Course overview
- b. Use of menus
- c. Screen information
- d. Help screens
- e. Access method
- f. Use of keys
- g. Searches
- h. Printers

#### 2. Common information

- a. Work groups
- b. Fee earners
- c. Client attributes
- d. Names and addresses
- e. Note types
- f. Undertakings

#### 3. Client set up

- a. Maintain clients

#### 4. Matter loading

- a. Client matters
- b. Case types
- c. Agenda driven cases
- d. Processing matters for the first time

#### 5. Process matter

- a. Execute event
- b. Case notes
- c. View undertakings
- d. Case information
- e. Amend overdue date
- f. Respond to event

#### 5. Process matter (continued)

- g. Event history
- a. Cancel event
- b. Reinstate event
- c. Add agenda
- d. Cancel outstanding lines
- e. Change to event driven
- f. Case options
- g. Diary forward
- h. Correspondence
- i. E-mail in and out
- j. Postings and charges
- q. Memo events
- r. Time postings
- s. Case history

#### 6. Overdue event list

- a. Sorting the list
- b. Outlook Task option
- c. Change filters
- d. Working from the overdue event list

#### 7. Reporting

- a. Maintenance reports
- b. Printing the overdue event list

#### 8. Supervisor

- a. Case colours
- b. Clear days
- c. Function authorisation
- d. Event groups
- e. Preparing to close matters
- f. Delete case