



Legal/Claims User Guide



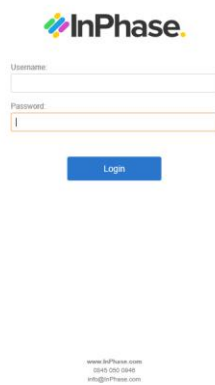
Contents

General Navigation and User Preferences.....	4
Accessing the Site	4
Username and Password	4
Navigation	5
Changing Password	5
View Date.....	6
Adding an Action.....	7
Workflow Stages	8
Legal/Claims Workflow	8
Explanation of Stages.....	9
New	9
Potential.....	9
Confirmed	9
Rejected	9
Closed.....	9
Archived	9
Legal/Claims	10
Create Claim.....	10
My Claims.....	11
Open/Closed Claims.....	12
Claim Actions	13
Claim Search.....	14

General Navigation and User Preferences

Accessing the Site

To access InPhase please enter your unique InPhase URL into any web browser.



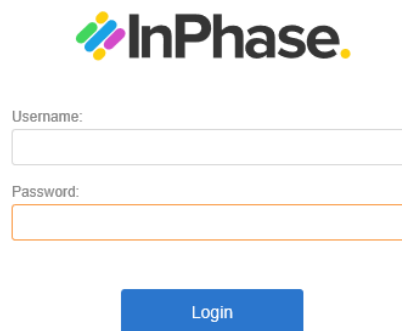
The screenshot shows the InPhase login page. At the top is the InPhase logo. Below it are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon to toggle visibility. A blue 'Login' button is positioned below the fields. At the bottom, there is a small footer with the website URL and contact information.



Username and Password

Usernames and passwords can be granted by an administrator.

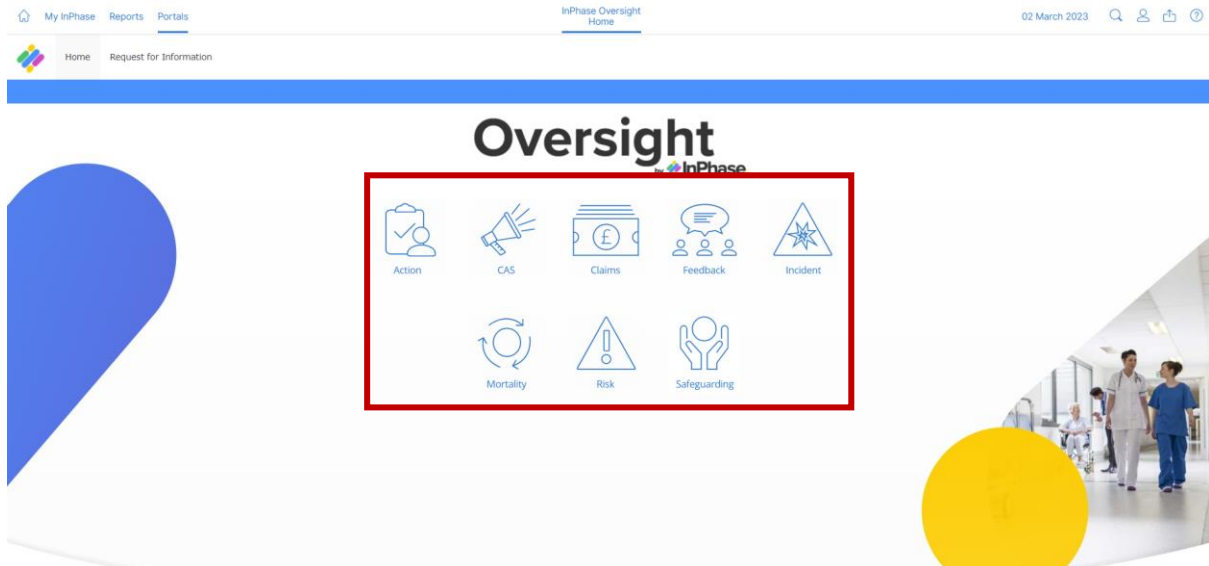
The username format is; ***FirstName Surname***



The screenshot shows a close-up of the InPhase login form. It features the InPhase logo at the top. Below the logo are two input fields: 'Username:' and 'Password:'. The 'Password:' field has a small eye icon. A blue 'Login' button is located below the fields.

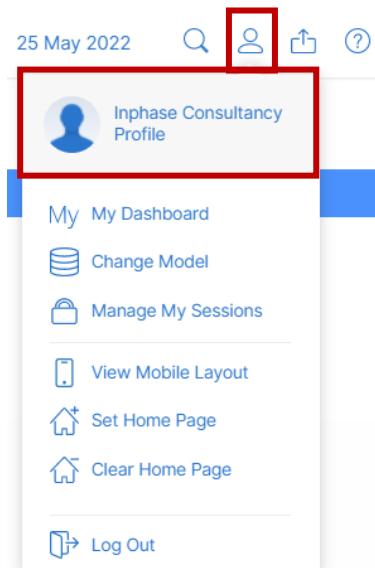
Navigation

To navigate to a page, click on the icon in the main menu.

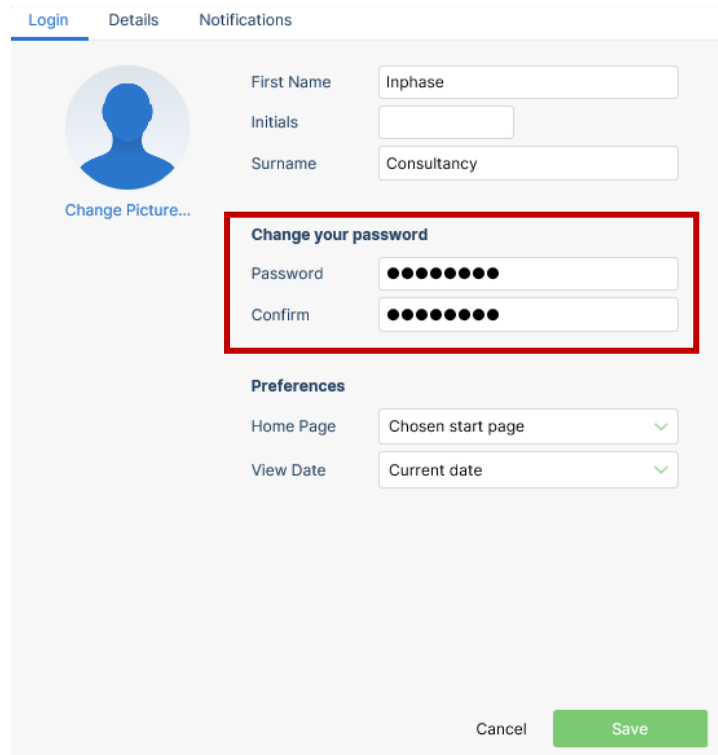


Changing Password

Click on the person icon at the top right-hand corner of the screen. Select **Profile** from the drop-down menu



Enter your new password in the fields provided and click save.



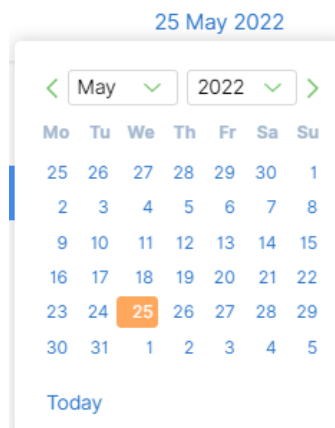
The image shows a user profile settings form with three tabs: Login, Details, and Notifications. The 'Details' tab is active. On the left, there is a profile picture placeholder with a 'Change Picture...' link. To the right, there are input fields for 'First Name' (containing 'Inphase'), 'Initials' (empty), and 'Surname' (containing 'Consultancy'). Below these is a 'Change your password' section, which is highlighted with a red box. It contains two password input fields, 'Password' and 'Confirm', both filled with black dots. Underneath is a 'Preferences' section with two dropdown menus: 'Home Page' set to 'Chosen start page' and 'View Date' set to 'Current date'. At the bottom right, there are 'Cancel' and 'Save' buttons.

You will notice that you have other preferences that you can change on the profile pop up also.

View Date

Data entered and displayed in InPhase is tracked by date. This means that if you wish to see past date or future time periods you can by simply changing the view date.

The view date is in the top right-hand corner of the screen. Click the date to produce the calendar.



Adding an Action

In each App there are icons or buttons to add Actions. Adding an action regardless of the App or page you are on requires the same process.

Actions

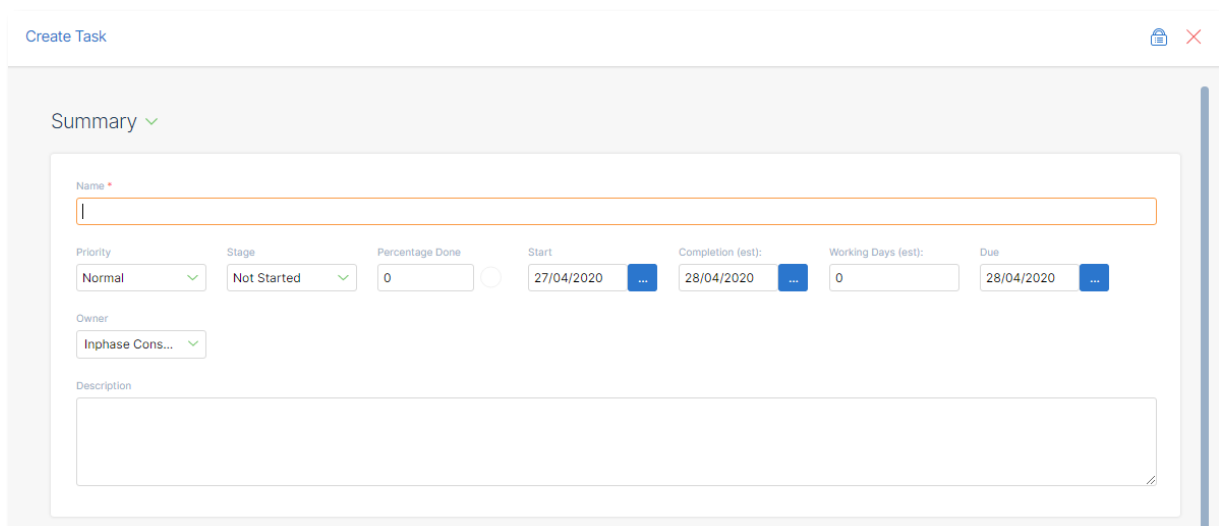
Please click the icon to create any Actions if required



Clicking on either an Add Action button or Icon will produce the Action pop.

The following fields need to be completed:

- Name
 - Limited to 100 Characters. Should be clear and concise to what the action is.
- Start
 - Calendar Selector. Date of when action will start
- Completion (est)
 - Calendar Selector. Data of when action is estimated (or actually) completed. When first adding an Action this should be set as the same as the Due Date
- Due
 - Calendar Selector. Date of when action is due to be completed by
- Owner
 - Defaults to the user adding the action. Can be changed if someone else will be responsible for completing the action.



The screenshot shows a 'Create Task' dialog box with a 'Summary' section. The fields are as follows:

Field	Value
Name	
Priority	Normal
Stage	Not Started
Percentage Done	0
Start	27/04/2020
Completion (est)	28/04/2020
Working Days (est)	0
Due	28/04/2020
Owner	Inphase Cons...
Description	

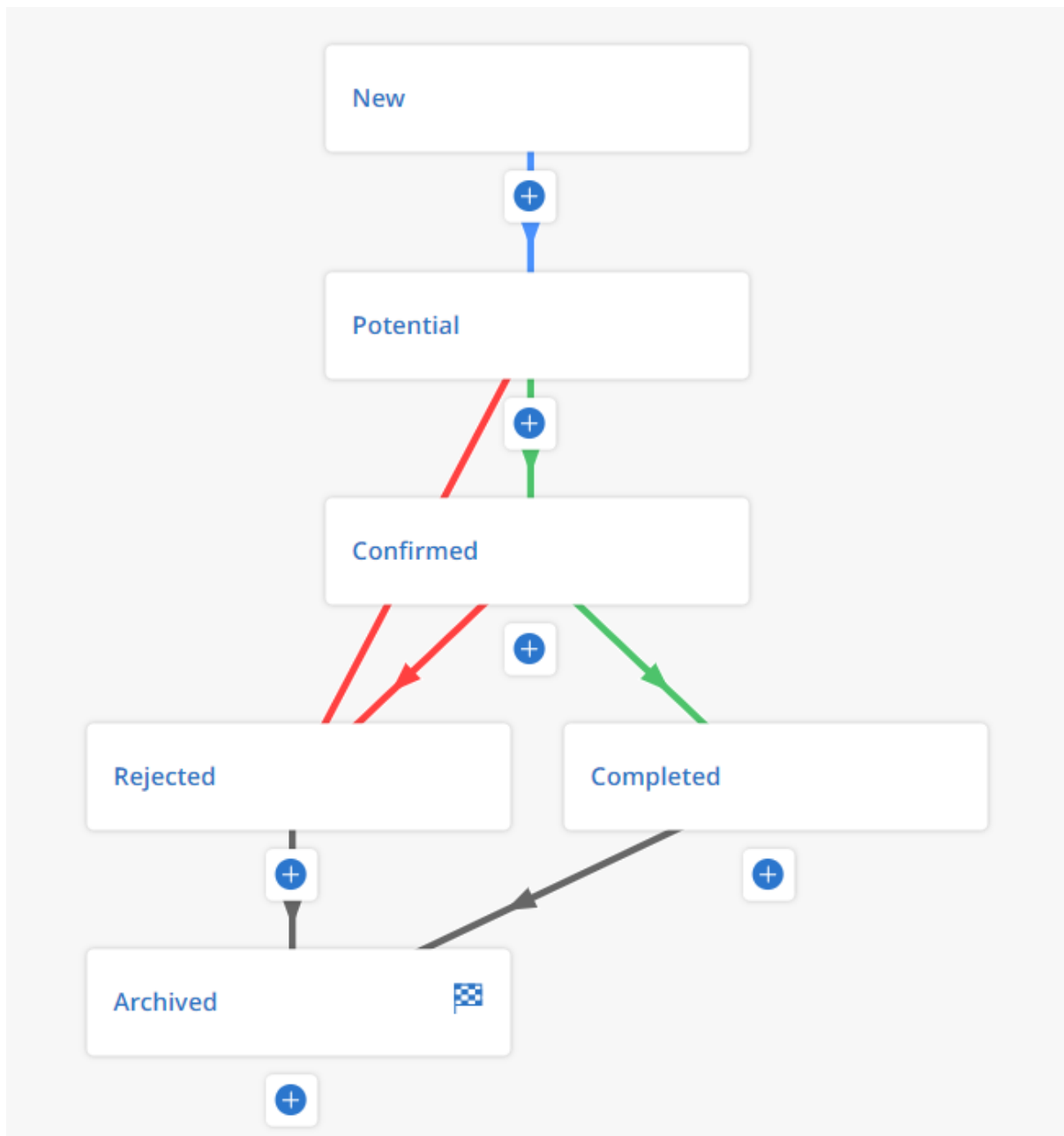
Once you have completed the required fields click Create.

Workflow Stages

Legal/Claims Workflow

The Legal Questionnaire in InPhase has a built-in 'Workflow', which controls the movement of the record from the moment the Questionnaire is opened to create a record, until the point at which the record is closed.

The Workflow for your Legal Questionnaire is displayed below.



Explanation of Stages

New

When the Questionnaire is opened, the record is in the 'New' Stage. In this stage, you can complete the necessary fields, and then click 'Submit'. Once you click 'Submit', the system will save the information and create the record in InPhase.

InPhase will display details of the InPhase ID number for the record you have submitted. Please take a note of this, as it is a useful way to quickly locate your record within the Legal App.

Potential

Once the record has been submitted, it will sit in the 'Potential' Stage. If you are the Owner of the record, the record will appear in your 'My Claims' page.

Once you have completed the necessary information, you can move the record to the 'Confirmed' stage, or reject the record, by using the buttons at the bottom of the Questionnaire.

Confirmed

The buttons at the bottom of the Questionnaire allow you to either Save (record remains 'Confirmed'), 'Complete' the record, or Reject the record.

Rejected

If the record has been rejected from the 'Open' stage, it will move into 'Rejected'. Once in this Stage, you can enter the 'Details of Rejection'.

Closed

If a 'Confirmed' record is ready to be closed, the user must click the 'Completed' button. This will move the record into the 'Completed' Stage. At this point, the system will automatically enter the 'Closed Date' for the record.

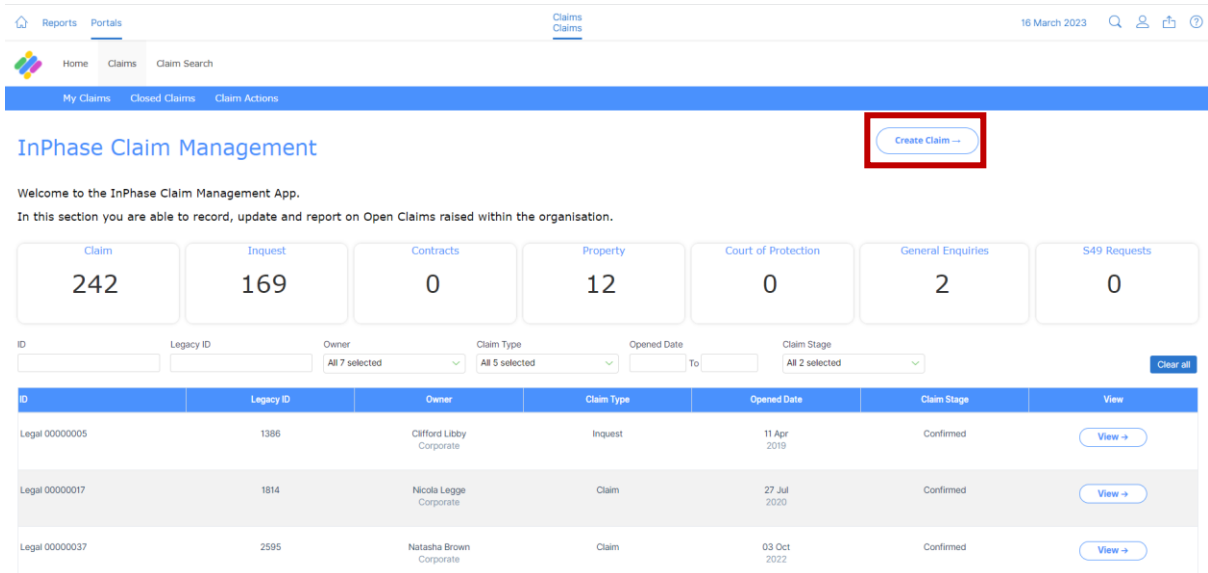
Archived

Records can be moved to an Archived state if needed. Once in 'Archived', the record will become read-only, so no amendments can be made. If a record is moved to 'Archived' in error, an InPhase Administrator can move it back to the required stage.

Legal/Claims

Create Claim

To create a new Legal record, click on the 'Create Claim' button.



The screenshot shows the InPhase Claim Management interface. At the top, there is a navigation bar with 'Reports' and 'Portals' tabs, and a 'Claims Claims' link. The date '16 March 2023' is displayed. Below the navigation bar, there are links for 'Home', 'Claims', and 'Claim Search'. A blue header bar contains 'My Claims', 'Closed Claims', and 'Claim Actions'. The main content area is titled 'InPhase Claim Management' and features a 'Create Claim --' button highlighted with a red box. Below the title, there is a welcome message and a list of claim categories with their respective counts: Claim (242), Inquest (169), Contracts (0), Property (12), Court of Protection (0), General Enquiries (2), and S49 Requests (0). A search filter section includes fields for ID, Legacy ID, Owner (All 7 selected), Claim Type (All 5 selected), Opened Date (To), and Claim Stage (All 2 selected), with a 'Clear all' button. A table below displays a list of claims with columns for ID, Legacy ID, Owner, Claim Type, Opened Date, Claim Stage, and View. The table contains three rows of data.

ID	Legacy ID	Owner	Claim Type	Opened Date	Claim Stage	View
Legal 00000005	1386	Clifford Libby Corporate	Inquest	11 Apr 2019	Confirmed	View ->
Legal 00000017	1814	Nicola Legge Corporate	Claim	27 Jul 2020	Confirmed	View ->
Legal 00000037	2595	Natasha Brown Corporate	Claim	03 Oct 2022	Confirmed	View ->

This will open the Feedback Questionnaire. Fill in the necessary fields, and then click 'Submit' at the bottom of the Questionnaire.

Record Data

Legacy ID

Email notifications log

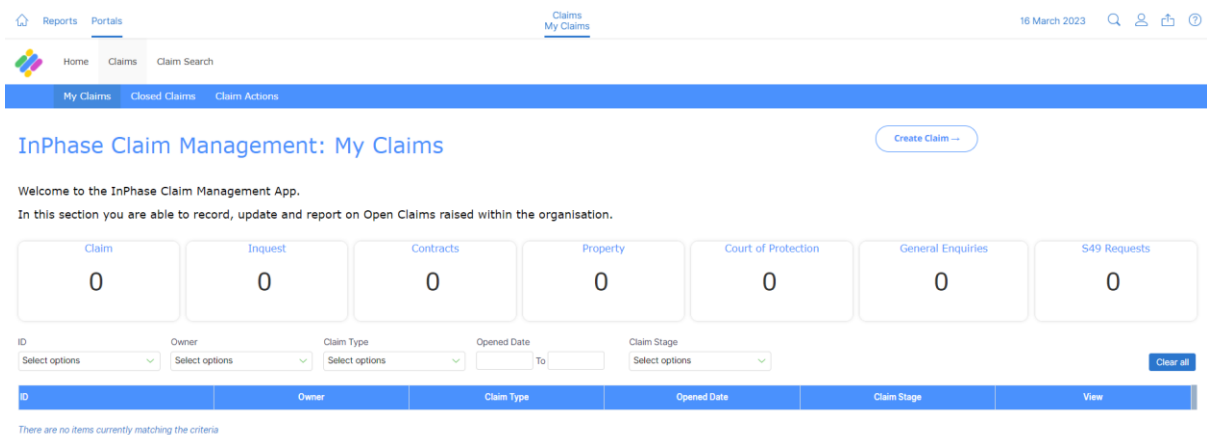
Log of all automated notifications

[Submit](#)

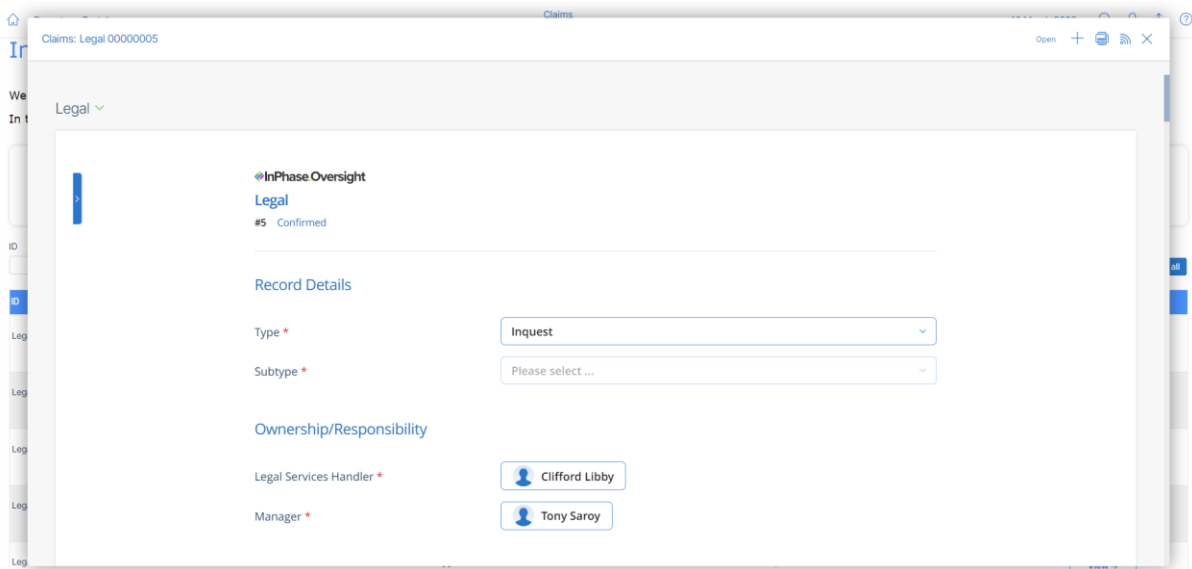
My Claims

This page displays all Legal records that are assigned to the user viewing the page. The 'counts' that run across the screen display how many records of each type are assigned to the user.

The details of the records display below.



To view the details of a record, double click on the item in the table, and the Questionnaire will be shown in a pop-up window.



You can make any amendments that you need to, and at the bottom of the Questionnaire, a series of buttons will display, that allow you to move the Feedback record between the different Workflow Stages.

Record Data

Legacy ID

Email notifications log

Log of all automated notifications

Reject

Save

Completed

Please note that the buttons will vary, depending on which Stage in the Workflow the record is currently sat in.

Open/Closed Claims

These pages display the details of all Legal records in the system, not just those that are assigned to the user viewing the page.

The pages are split between 'Open' and 'Closed'.

The 'Open' page contains records that are sat in the following Workflow Stages.

- Potential
- Confirmed

The 'Closed' page contains records that are sat within the following Workflow Stages.

- Completed
- Rejected
- Archived

The page is structured in a similar way to the 'My Claims' page, with 'count' visualisations displaying how many records sit within the different 'types'.

InPhase Claim Management: Closed Claims

Create Claim --

Welcome to the InPhase Claim Management App. In this section you are able to update and report on Closed Claims raised within the organisation.

Claim 492	Inquest 1,649	Contracts 0	Property 0	Court of Protections 0	General Enquiries 0	S49 Requests 0
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ID Legacy ID Owner All 7 selected Claim Type All 7 selected Opened Date To Claim Stage All 2 selected Clear all

ID	Legacy ID	Owner	Claim Type	Opened Date	Claim Stage	View
Legal 00000002	140	Ian Marks Corporate	Property Expenses Scheme	03 Sep 2012	Completed	View ->
Legal 00000004	861	Ian Marks Corporate	Claim	31 Mar 2017	Completed	View ->
Legal 00000007	808	Cally-Marie Henderson Corporate	Inquest	03 Feb 2017	Completed	View ->

Claim Actions

This page displays details of all Actions that have been added against Legal/Claims records.

You can filter the tables using the slicers at the top and can edit the Actions by clicking on the 'Data Entry Mode' icon. If needed, the Action table can be exported to Excel by clicking on the icon in the top right corner.

Claims Action Tracker

Create Claim --

Owner Inphase Consultancy Due Date Between to Stage Not Started Export

Action	Details	Add Sub-Action	Owner	% Complete	Start Date	Due Date	Completion Date (est)	Late by Working Days	Action Update
10000 - HCW 1 to be supported to work under the supervision of the nurse-in-charge for three months.			Inphase Consultancy	0%	not set	not set	not set		
10001 - Share learning via clinical highlights presentation			Inphase Consultancy	0%	not set	not set	not set		
10002 - Raise Profile of Closed Culture at Leadership Event			Inphase Consultancy	0%	not set	not set	not set		

Claim Search

This page allows you to search for any Legal/Claims record.

You can enter your search criteria into the fields running down the left hand side of the page, and then click 'Search' once all your search criteria have been entered.

The search results will then be populated in the table, along with a 'count' of the number of result(s) found.

Reports Portals
Claims Claim Search
16 March 2023

Home Claims Claim Search

728
result(s) found

InPhase ID

Legacy ID

Type
Claim

Subtype
All 33 selected

Stage
All 4 selected

Handler
All 13 selected

Manager
All 8 selected

Incident date
 to

Opened date
 to

Closed date
 to

ID	Legacy ID	Type	Persons - Surname	Handler	Opened date	Stage	Open Form in Tab
Legal 00000004	861	Claim		Ian Marks	31 Mar 2017	Completed	Open Form in Tab
Legal 00000017	1814	Claim	Adeleye	Nicola Legge	27 Jul 2020	Confirmed	Open Form in Tab
Legal 00000018	574	Claim		Ian Marks	05 Apr 2016	Completed	Open Form in Tab
Legal 00000020	575	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000022	593	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000024	577	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000025	578	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000027	585	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000029	586	Claim		Ian Marks	06 Apr 2016	Completed	Open Form in Tab
Legal 00000032	195	Claim	Agbogah	Ian Marks	21 Nov 2013	Completed	Open Form in Tab
.....	Open Form in Tab