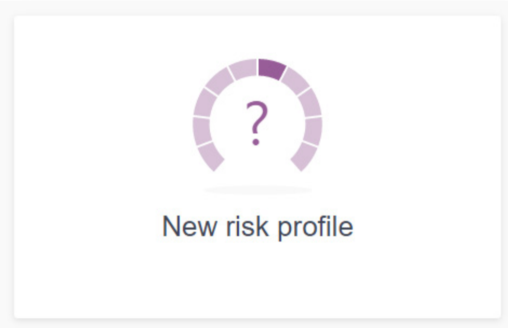
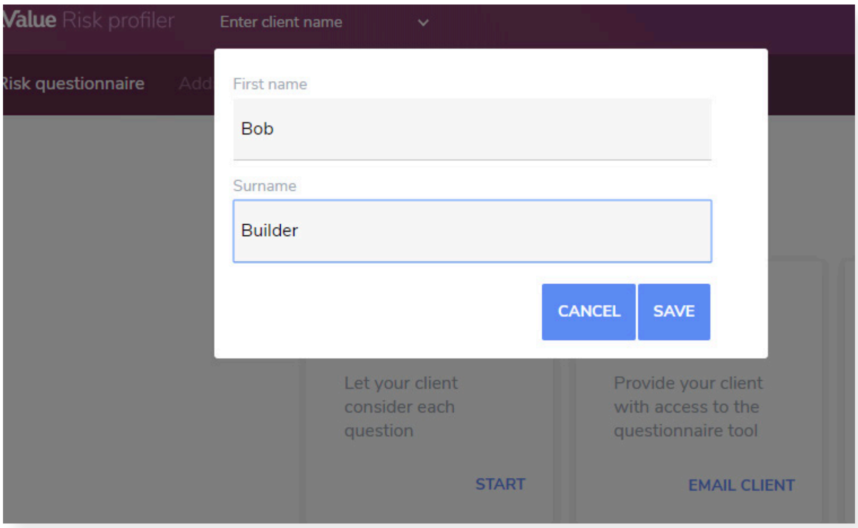
Adding or amending case names

Risk Profiler

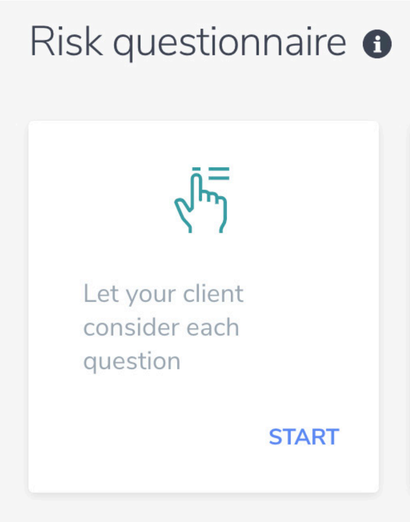
Login and select New risk profile:



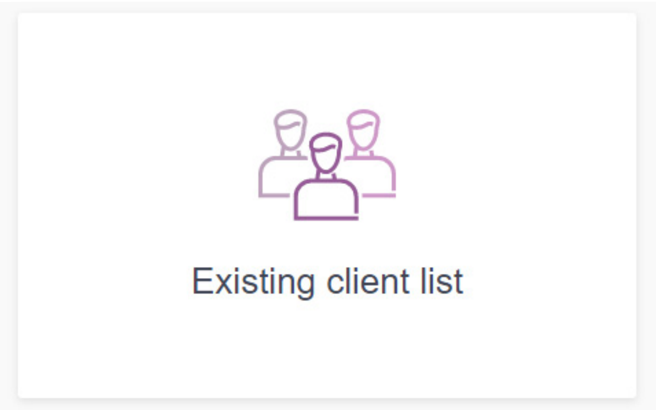
Go to the top of the next screen and select the drop down arrow next to client name. In the pop up box, enter the client's name and click Save.



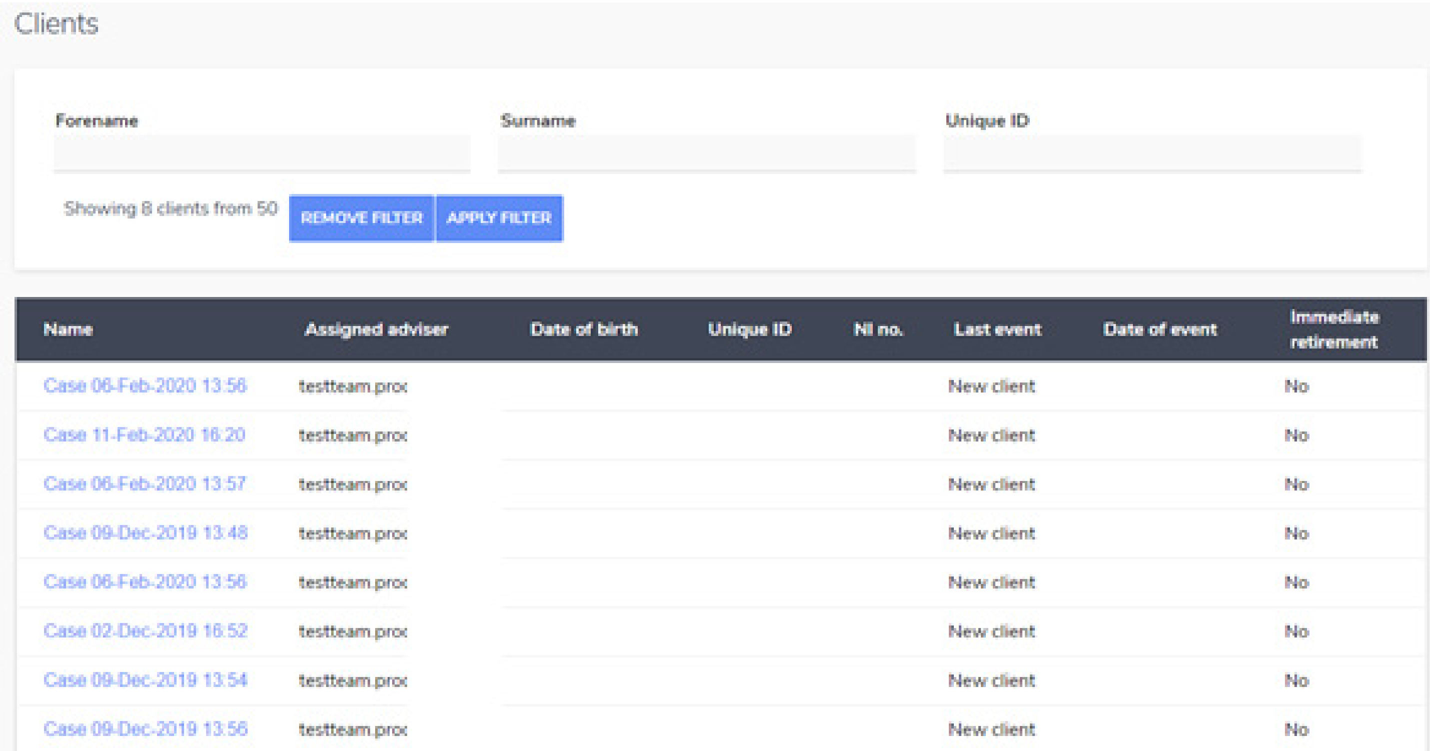
Continue through to the service as normal:



Login and access the Existing Client list:



The cases will be shown in the following format:


Clients

Forename | Surname | Unique ID

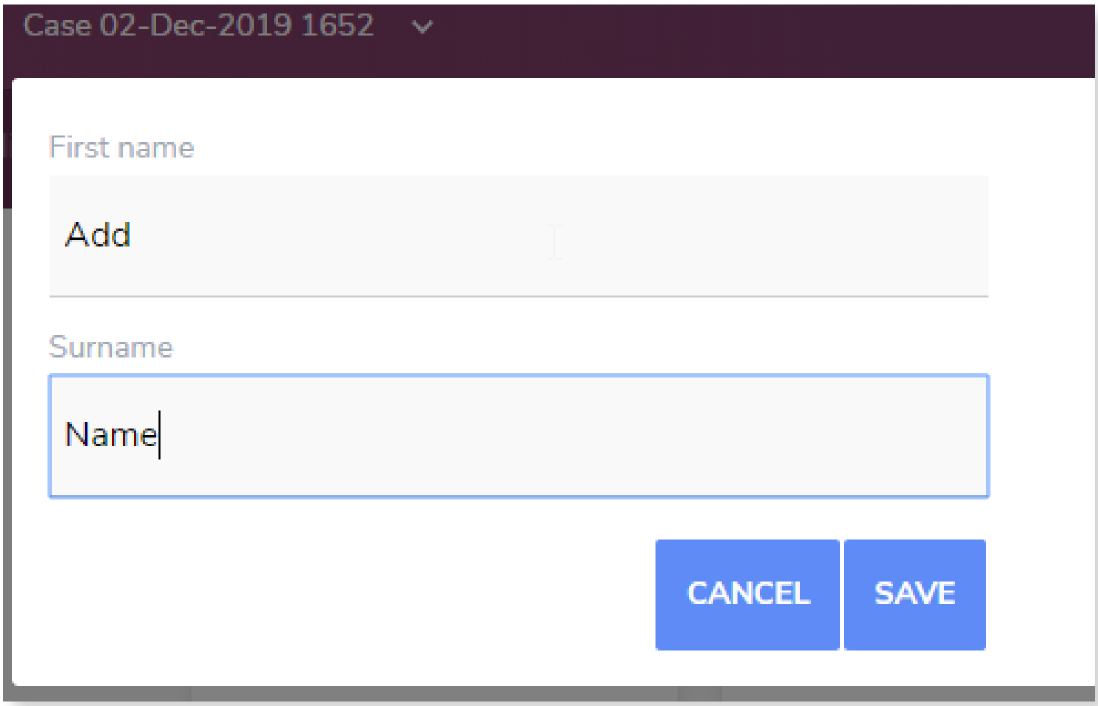
Showing 8 clients from 50 REMOVE FILTER APPLY FILTER

Name	Assigned adviser	Date of birth	Unique ID	NI no.	Last event	Date of event	Immediate retirement
Case 06-Feb-2020 13:56	testteam.proc				New client		No
Case 11-Feb-2020 16:20	testteam.proc				New client		No
Case 06-Feb-2020 13:57	testteam.proc				New client		No
Case 09-Dec-2019 13:48	testteam.proc				New client		No
Case 06-Feb-2020 13:56	testteam.proc				New client		No
Case 02-Dec-2019 16:52	testteam.proc				New client		No
Case 09-Dec-2019 13:54	testteam.proc				New client		No
Case 09-Dec-2019 13:56	testteam.proc				New client		No

Select the required case:

Go to the top of the next screen:

Click on the drop down, which will present a pop up box. Enter the client's name in the fields provided and click 'Save'



On returning to the Existing client list, the case name will have been updated: