



MCASE V6 UPGRADE

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# mCase v6 Highlights



# What's New in mCase v6

## New Homepage

The screenshot displays the mCase v6 homepage. At the top, there is a 'Welcome back, Tom!' message and an 'Edit widgets' button. Below this is a 'To do' widget with filters for Record, Due Date (Default), and Priority, and a 'Reset Filter' button. The 'To do' list includes items like 'File Progress Report', 'Complete Intake Form', 'Inquire about care plan', 'File Incident report', 'Meet with John', 'Check In with Caregiver', 'Bi-weekly Check-in', 'Add Allegations', 'Complete Risk Assessment', and 'Safety Assessment and Plan Need'. Below the 'To do' widget are four main sections: 'Workspaces' with icons for Persons, Intakes, Investigations, Protection Cases, Foster Care/Kinship Provid., Prevention Cases, Programming & Activities, Shared Calendar, Adoption, and Children in Care (CIC); 'Recent Activity' showing updates by Tom Anderson; 'Bookmarked Records' with a table of records; and 'New Associated Record' with buttons for Case Plan, Events, Notes, and Relationships.

Workspace	Record	Creation Date
Persons	John Winters	01-27-2023
Persons	Jeanne Smith	01-27-2023
Investigations	Investigation : 859692595 - John's Investigation	01-27-2023
Programming & Activities	Program: Youth Weekly Meet-up - 01/26/2023	01-27-2023

- New Home page allows users to easily see key details and prioritize their work.
- When users log in, Home is now their main landing page, which can be personalized by selecting and arranging their preferred widgets.
- Widgets such as the *To-do*, *Recent Activity*, *Bookmarked Records* and *New Associated Records* provide rapid navigation and quick access to key areas in the system.

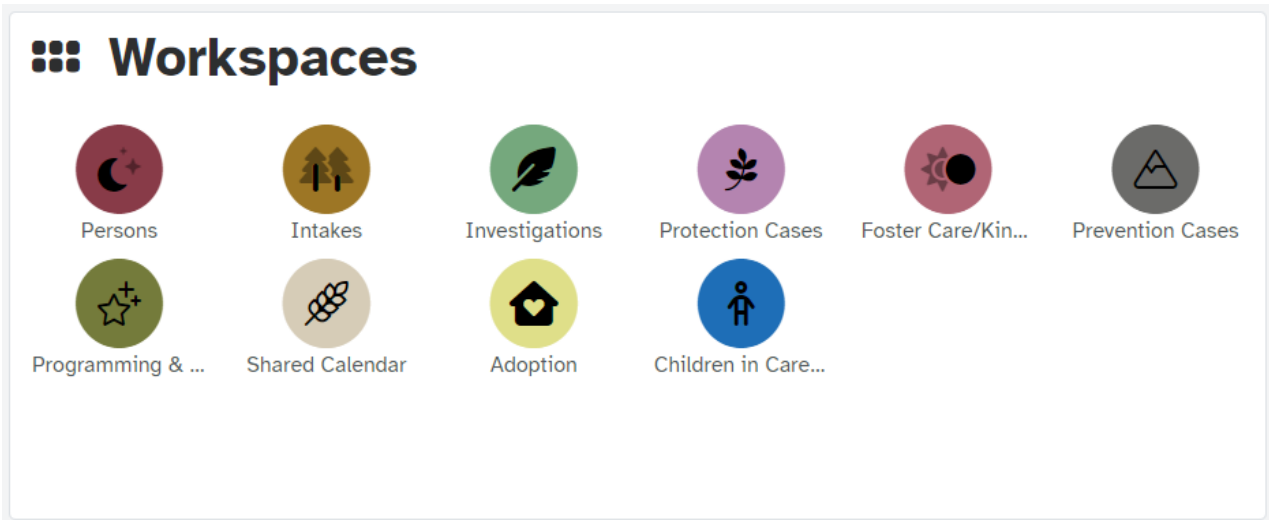
## To-do Widget

The close-up screenshot shows the 'To do' widget with filters for Record, Due Date (Default), and Priority, and a 'Reset Filter' button. The list of action items is as follows:

Action Item	Record	Due Date	Priority
Complete Intake Form	Investigation : 859692595...	01/26/2023	Overdue priority
Inquire about care plan	Jeanne Smith	02/01/2023	Critical priority
File incident report	Jeanne Smith	02/02/2023	High priority
Meet with John	John Winters	01/30/2023	Medium priority
Check In with Caregiver	Investigation : 859692595...	02/03/2023	Low priority

- Users can now see their To-do action items prominently displayed on the Home page in a grid or list view that can be filtered based on specific records, Due Dates or Priority.
- To-dos are prioritized based on an agency's policy and practices with colour-coded levels indicating the importance of each item: Critical (red), High (orange), Medium (yellow), Low (green), No Priority (grey). If a To-do is not dismissed before the due date, it will have an overdue indicator including a red outline and an exclamation point next to the due date.
- Clicking the link within the To-do takes the user to the screen needed to complete the work.
- This widget will only appear when To-dos are created. To remove the widget from your Home page, click the *Edit Widgets*. (see the [Personalized Home Page Widget Layout](#) section).

## Workspaces Widget



- This new Home page widget contains icons linking the user to each Workspace.
- In addition to the alphabetical listing within the Workspaces tab, v6 Workspaces can now be organized according to the business flow within the Home page widget.


## Bookmarked Records Widget



- Users can now bookmark records such as Person, Case, Intake, Programming, etc. for future reference. Bookmarking bypasses the need to search, to quickly navigate to a specific record.
- This widget lists bookmarked records with their associated Workspace, record name, and the bookmark creation date.
- Click the icon within the widget or the top left of the record, to manage a bookmark.



## New Associated Record Widget


### + New Associated Record



**Appointments**








+ New Case Plan


-  Protection Cases >
-  Children in Care (CIC) >



**Case Notes**


+ New Events

-  Investigations >
-  Protection Cases >
-  Prevention Cases >
-  Foster Care/Kinship Providers >
-  Intakes >
-  Adoption >
-  Children in Care (CIC) >



**Calendar**

+ New Notes



**Relationships**

+ New Relationships

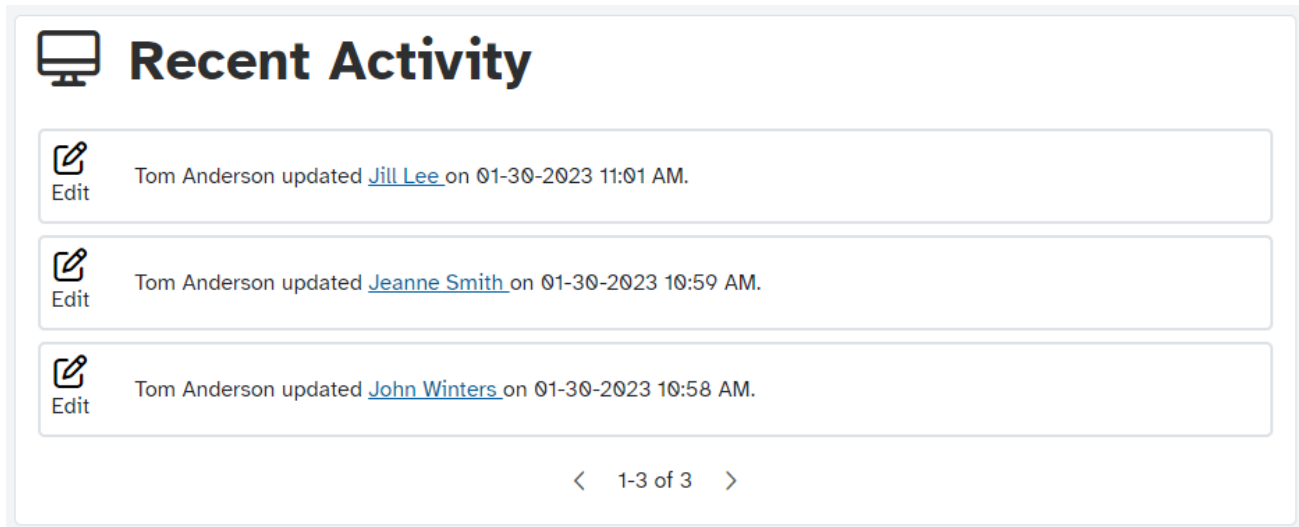
- Users can quickly create a new associated record, such as a Case Note, Appointment, or Calendar Event, with less navigation needed to reach the associated parent record.
- Clicking on an item in this widget displays a search dialogue asking the user to select a record to associate the activity with, where the user can then enter a new record directly.

### New Relationships in Persons ✕

Q

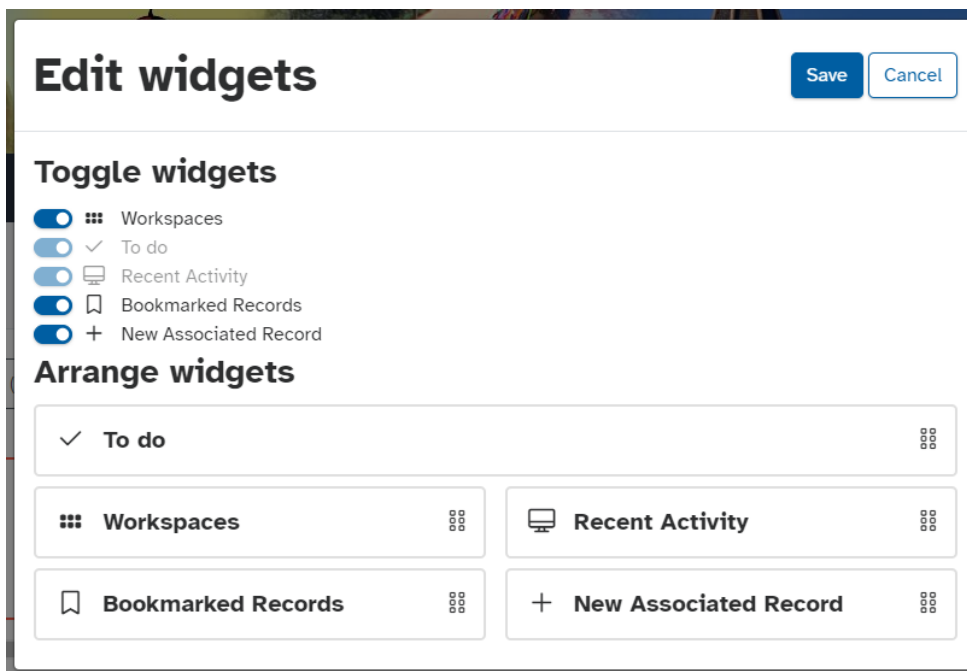
Person ID	Last Name	First Name	Middle Name	Date of Birth
183237669	Lee	Jill		
112598320	Smith	Jeanne		03/11/1994 ( 28 years, 10 months )

## Recent Activity Widget



- Users can now see the most recent work performed on their records.
- Recent activity can help quickly navigate back to those same recently updated records.
- The widget displays a link to the record, the type of activity performed such as Create, Edit, Merge actions, along with who made the change and when.

## Personalized Home Page Widget Layout

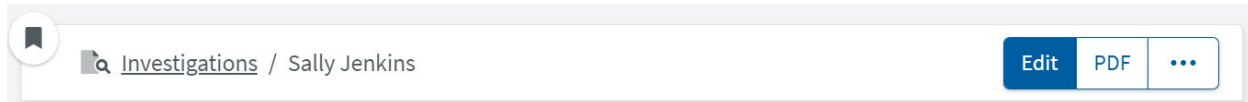



- *Edit Widgets* button allows users to personalize their Home page and widget layout.
- Users can toggle optional widgets On or Off, to display on their Home page.
- Users can drag and drop to rearrange the widget display on their Home page.
- Each agency decides which widgets are configured as mandatory, optional, or hidden entirely.

## New Features

Version 6 update includes new features for bookmarking records of interest, making effective searches, and an improved look for tabs.

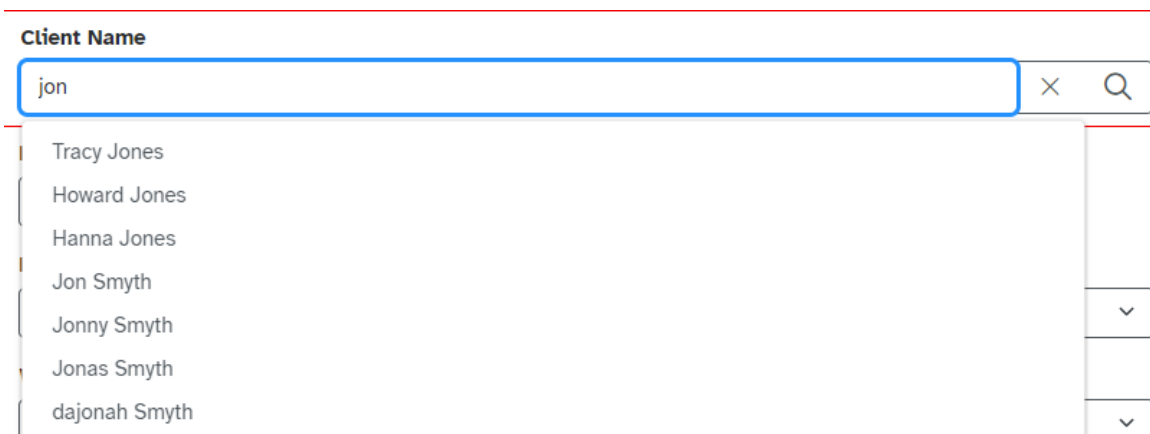
### Record Header



- As mentioned above, users can now bookmark records for future reference and view a list of their bookmarked records from their Home page. A bookmarked record will display the black bookmark icon  in the top left of the record header.
- The top right of each record now displays the two most used action buttons (Edit and PDF) alongside the main action menu ...

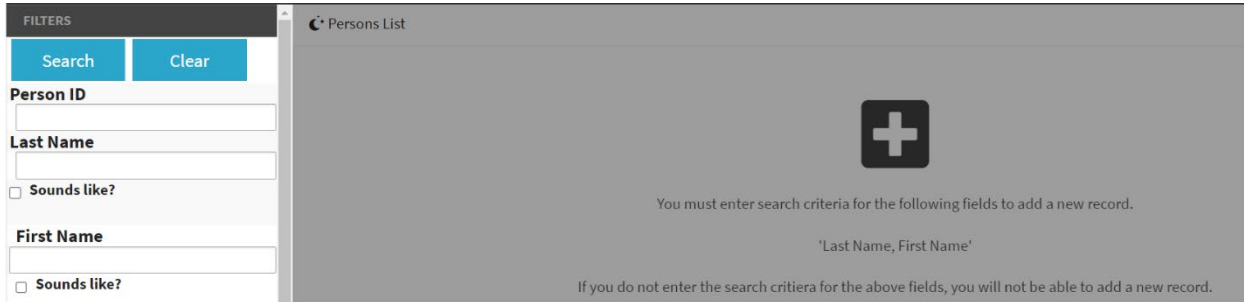
### Predictive Search

- As a user types in the search bar, the search is refined to reflect results based on the additional input.
- A wildcard is enabled to display results for partial matches. For example, if the user inputs "Jon", then the predictive search will display results for "Jones" and "Jonny" and "Jonas" and "dajonah" alongside "Jon". Here is an example:

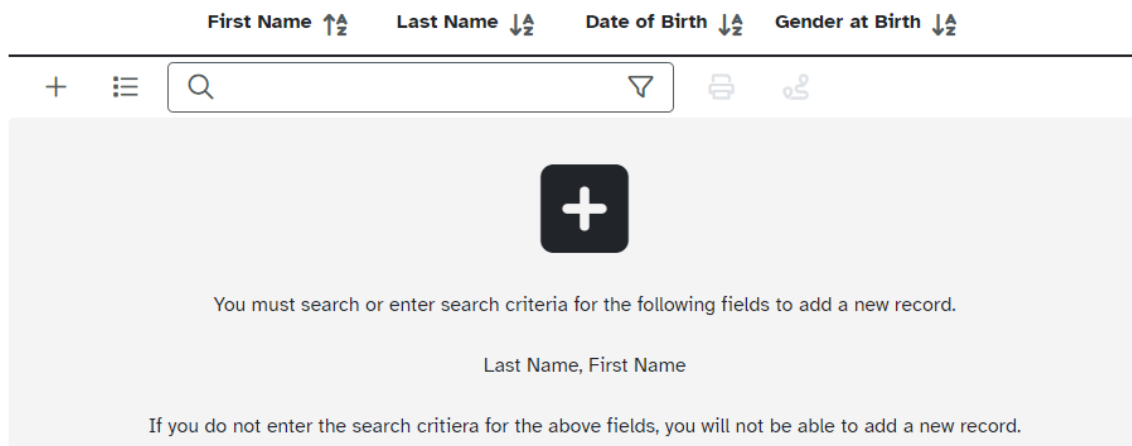


## Mandatory Workspace Search

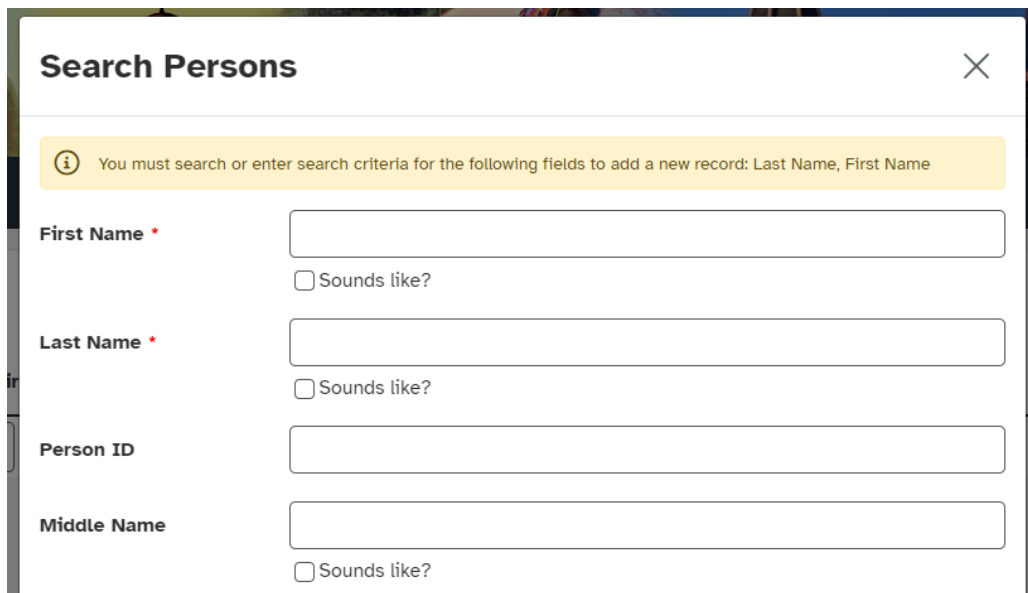
- To reduce creation of duplicate records, an advanced search is required before creating new records.
- This updated advanced search has a new pop-up window and more intuitive screen layout.
- Here is an example of how mandatory search appeared in v5:



- And here is a similar example in v6:



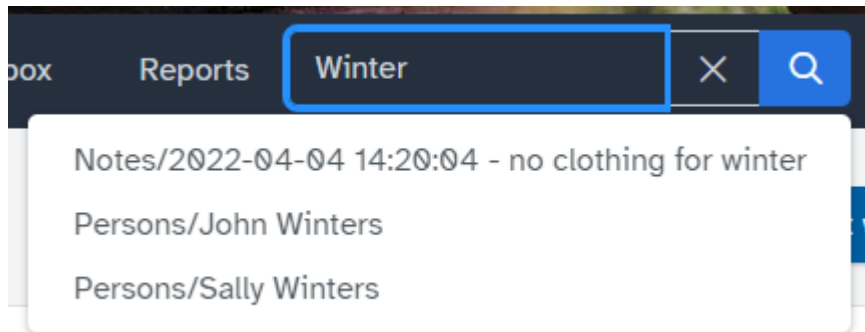
- Notice the advanced search window on the left-hand side in v5 is no longer visible.
- Users can simply type into the new search bar to perform a quick search.
- Clicking the + icon or the filter icon displays the advanced search as a pop-up window:



## Improved Navigation

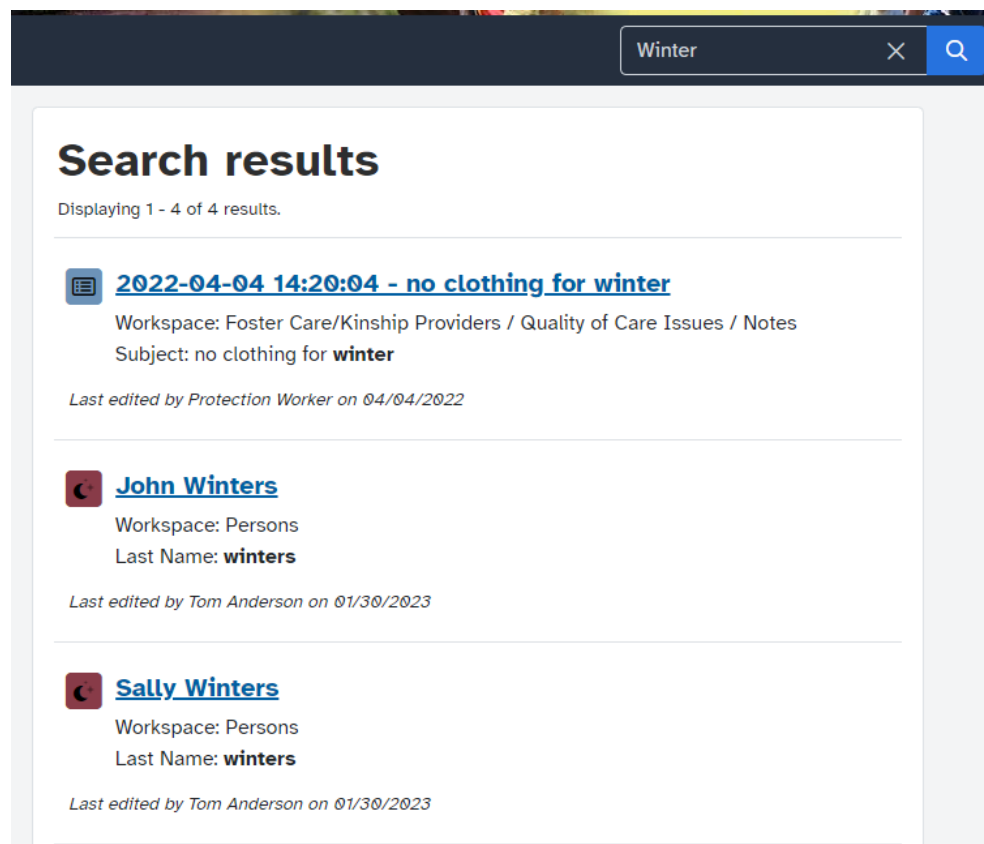
- RedMane has redesigned the Navigation Bar with a more intuitive way to move through the system.
- This includes access to the new Home page, a new Global Search from anywhere in the application, and improved display of the current tab and workspaces.

## New Global Search



**TIP: Ensure your browser is auto-updating. This feature works best with the latest version of Chrome.**

- RedMane has introduced a new Global Search in the Navigation bar.
- This new search is a Google-like search engine where a user can input a record ID number, partial name, or phrase to generate results across all record types (Person, Intake, Case, Programming, etc.)
- This broad, system-wide search differs from other mCase searches which are specific to a particular Workspace and require strict criteria to generate results.
- Users can select records from the dynamic quick pick results list (see above) or from the full results page (displayed when clicking the magnifying glass):





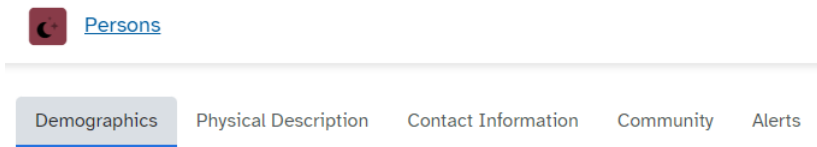
## Workspaces

- The Workspaces tab now features an alphabetical listing of the agency’s Workspaces.
- This feature enables users to navigate to a desired Workspace from anywhere in the system.



## Tabs

- For visual clarity and better text readability, the current tab has been updated with a light grey background and a blue underline.



## Updated Workspace Pages

- mCase v6 now allows users to select how they want their Workspace to display, offering list, grid, calendar, and map views depending on the context.

Persons List

	First Name	Last Name	Date of Birth	Gender at Birth	
<input type="checkbox"/> <a href="#">Select</a>	Winter	Winters	03/08/2007 (15 years, 10 months)	Female	<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Select</a>		Winters	01/27/2004 (19 years)	Male	<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Select</a>	Sally	Winters		Female	<a href="#">Edit</a>