Higbee & Associates

Case Management Portal

User Guide

About this document

This guide explains howto navigate the portal, find and open cases, record updates in Notes, manage Assignments,and (for admins) manage Users. Screenshots use example data and dummy names.

Version: v1.0

Last updated: 2026-01-29

Audience: Vendor Admins, Org Users, Vendor Users, and (optionally) Client Users

Owner: ___________________

Support: _____________________

Primary areas covered

- Cases list (search, filters, columns, export)
- Case record tabs: Details, Notes, Assignments
- Role-based visibility and permissions
- Operational standards for notes and updates

Table of Contents

1. Overview
2. Roles and Permissions
3. Interface Tour
4. Working with Cases
5. Case Record Tabs (Details, Notes, Assignments) Standards and Templates
6. Troubleshooting
7. Glossary

1. Overview

The Case ManagementPortal is a web-based platform for viewing and managing case records. Most users will spendtime in the **Cases** area to locate a case, then open a case record to review **Details**, add **Notes**,orview **Assignments**.

> **How to use this guide**
>
> Each section includes:purpose, who can perform the action, steps, expected result, and common mistakes. Keep the guide updated by changing the version/date on the cover page whenever workflows change.

What you need before you start

- A portal user account and assigned role (Vendor Admin, Org User, Vendor User, etc.)
- The case identifier you plan to search for (Case ID, Court Case Number, or Defendant name)
- A standard for writing notes (see Section 8)

2. Roles and Permissions

Access intheportalis controlledbyroles.The role determines what cases you can see and whether you can manage users.

Role definitions

- **Org Admin:** Super user. Typically **Higbee & Associates staff only** (not assigned to external vendors). Has **global access** to manage everything — **all cases across all vendors** and **all users** (create/edit/deactivate, roles, vendor scope). **Vendor Admin** - Vendor-specific admin.
- Can manage cases and users only within their vendor scope.
- **Org User** - Higbee & Associates user. Can view cases across all vendors, but cannot manage users.
- **Vendor User** - Vendor-scoped. Can view cases, but cannot manage any users.
- **Client User** - (To confirm) Likely restricted to viewing only their own case and no other cases.

Permissions matrix(typical)

Capability	Org Admin	Vendor Admin	Org User	Vendor User	Client User
View cases	All Vendors	Vendor only	All vendors	Vendor only	Own case only
Search / filter cases	Yes	Yes	Yes	Yes No Yes	Limited
Export cases list	Yes	Yes (vendor)	Maybe	(vendor)	No
View case details	Yes	Yes(vendor)	Yes	Yes (vendor)	Yes (Own)
Add / edit case notes	Yes	Yes (vendor)	Yes	No No	No
Manage assignments	Yes	Yes (vendor)	No		No
Create / edit users	Yes (global)	Yes (vendor)	No		No

*Client User permissions should be confirmed and updated in this table once finalized.

3. Interface Tour

Theportal layoutis consistent across pages: a left sidebar for navigation, a top bar with profile controls, and a main content area that changes based on the selected module.

Key UI regions

• **Left sidebar** - switch between **Cases** and **Users** (Users may be hidden for non-admin roles).

• **Top bar** - profile menu, Feedback, and quick actions (icons may vary by role).

•**Main content** - lists, filters, and the selected case record.

Cases list page

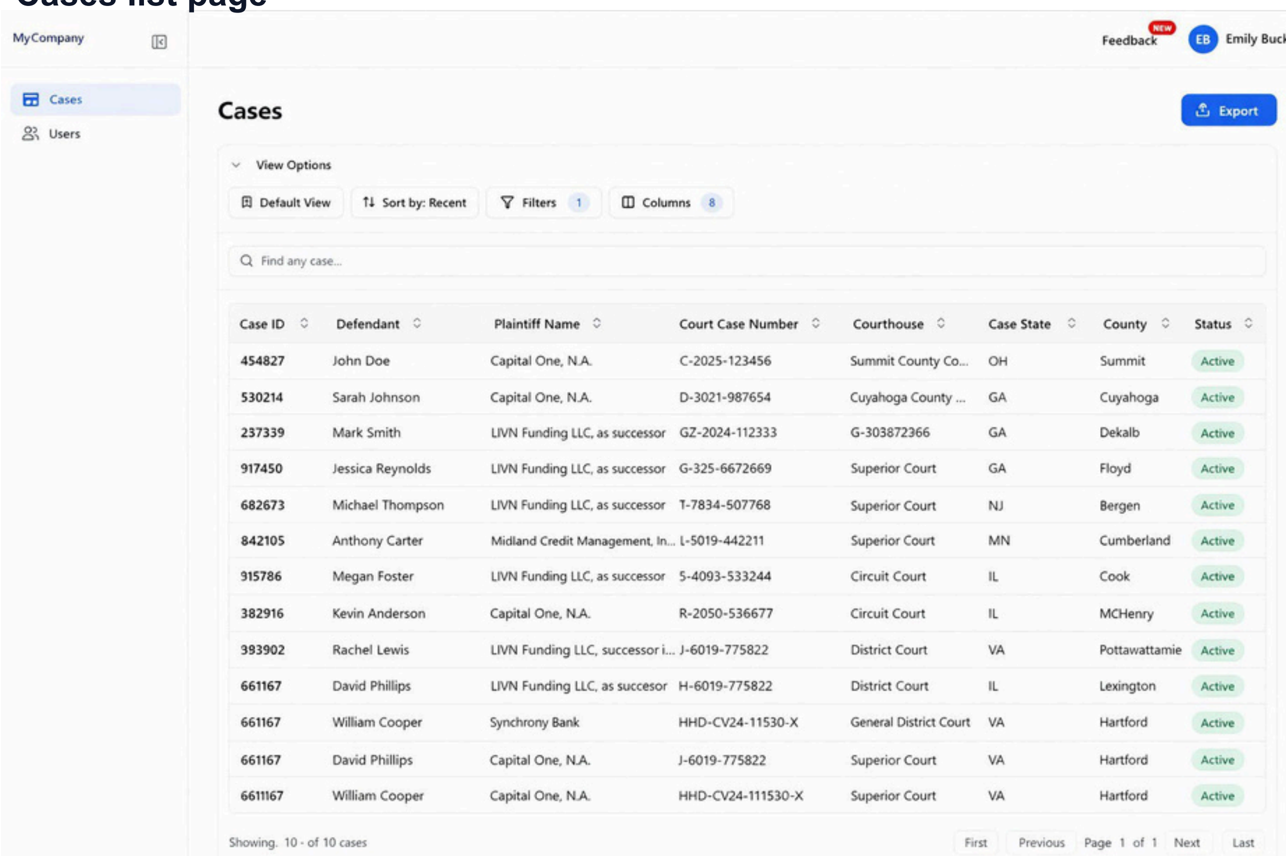

Figure 1. Cases list with View Options (Default View, Sort, Filters, Columns), search bar, and case table.

4. Working with Cases

Use the**Cases**pagetolocateandopen a case. You can search, apply filters, customize columns, and export results.

4.1 Find a case (search)

Purpose: Locate a caseby Case ID, Defendant, or Court Case Number.

Who candothis: All roles with case access.

Steps:

- Open **Cases** from the left sidebar.
- Clickthe search field (example: "Find any case…").
- Enterone identifier (Case ID or Court Case Number usually works best).
- Press**Enter** and review the results.

Expected result: The case list filters to matching records.

> **Search tip**
>
> If searchingby a name yields too many results, switch to Case ID or Court Case Number for faster matching.

4.2 Use filters and columns

Purpose: Narrowresults and control which fields appear in the table.

Steps:

- Select **Filters** toadd/remove filter conditions.
- Use **Columns** toshowor hide table fields.
- Use **Sort by** toswitchthe ordering (for example, Recent).

> **Admin vs non-admin**
>
> Filtering and columnsareavailable to most roles, but some columns may be hidden depending on role permissions.

4.3 Export a case list

Purpose: Download a snapshot of the current list view (including filters).

Who can do this: Vendor Admin, Org User, Vendor User (if enabled).

Steps:

- Applyfilters/columns as needed.
- Click**Export** in the top-right of the Cases page.
- Savethe exported file to the appropriate location.

> **Data handling**
>
> Exports may contain sensitive information. Store files in approved systems and avoid emailing exports unless encrypted and authorized.

5. Case Record Tabs

Openacaseto viewitsrecord.The record contains multiple tabs, typically **Details**, **Notes**, and **Assignments**.

5.1 Open a case record

Steps:

- Fromthe Cases list, click the row for the case you want.
- Confirm the case header shows the correct defendant name and case ID.
- Use the tab bar to switch between Details, Notes, and Assignments.

5.2 Details tab

Purpose: View the authoritative case identifiers, timeline dates, location, and financial summary.

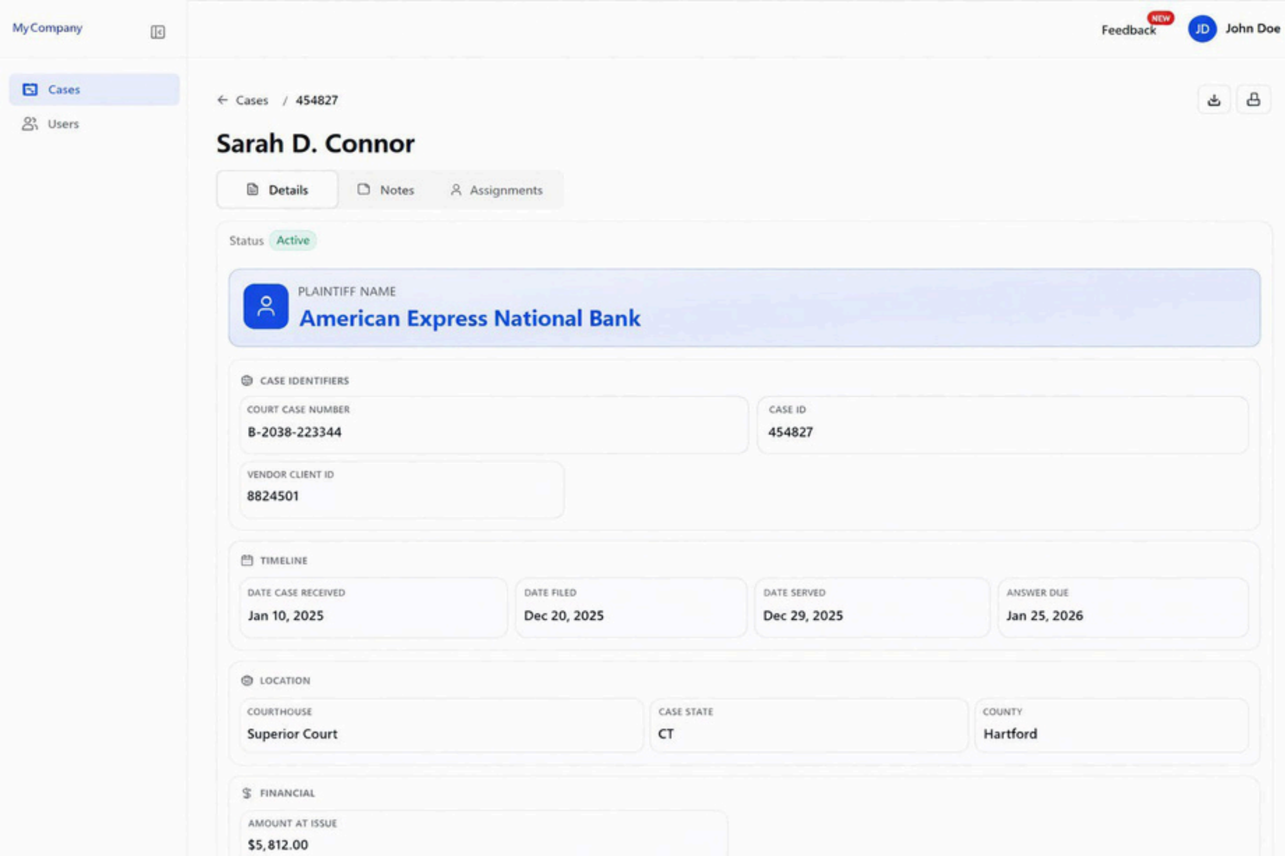

Figure 3. Example case record - Details tab showing Plaintiff Name, Case Identifiers, Timeline, Location, and Financial.

Common fields

- **Status** - Current status (example: Active).
- **Plaintiff Name** - Name of plaintiff/creditor entity.
- **Case Identifiers** - Court Case Number, Case ID, Vendor Client ID.
- **Timeline** -Date received, date filed, date served, answer due/answer filed (as applicable).
- **Location** -Courthouse, State, County.
- **Financial** -Amount at issue (if captured).

5.3 Notes tab

Purpose: Recordupdates and internal commentary tied to a case.

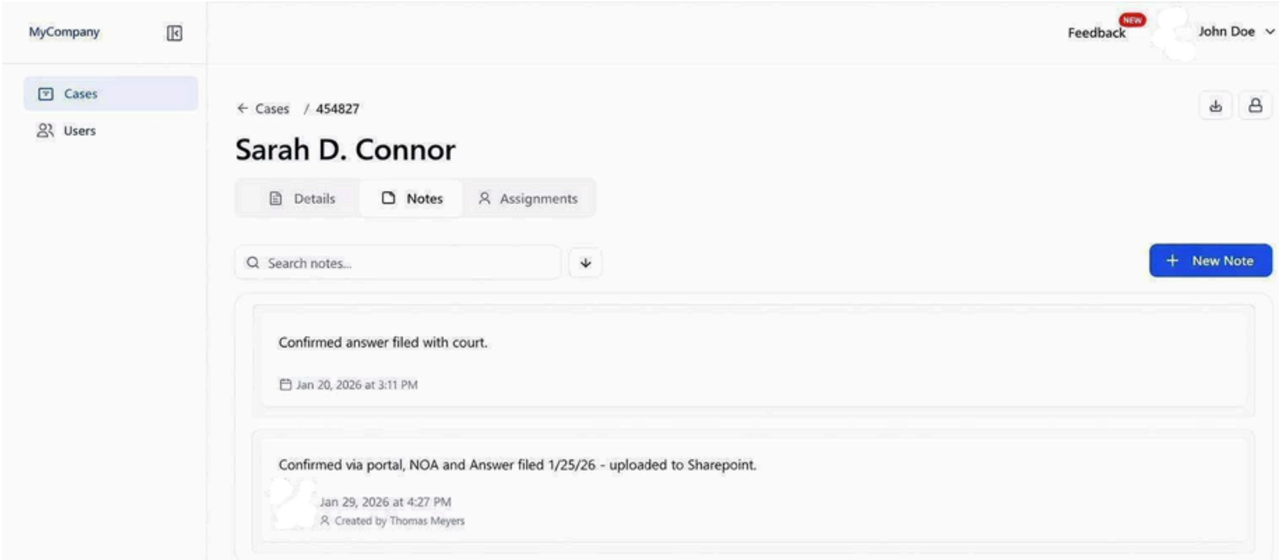

Figure 4. Notes tab with search bar, New Note button, and note cards with timestamps and created-by metadata.

Add a note (standard workflow)

Steps:

- Openthe case record and click **Notes**.
- Use**Search notes** to check whether a similar update already exists.
- Click**New Note**.
- Enterthe update using the note standard (Section 8) and save.

Expected result: A new note appears with a timestamp and the author.

> **Note quality**
>
> Start with theoutcome, then add the source. Example: “Confirmed answer filed with court (source: portal).”

5.4 Assignments tab

Purpose: Viewwhichusersare assigned to the case, and (if permitted) assign users.

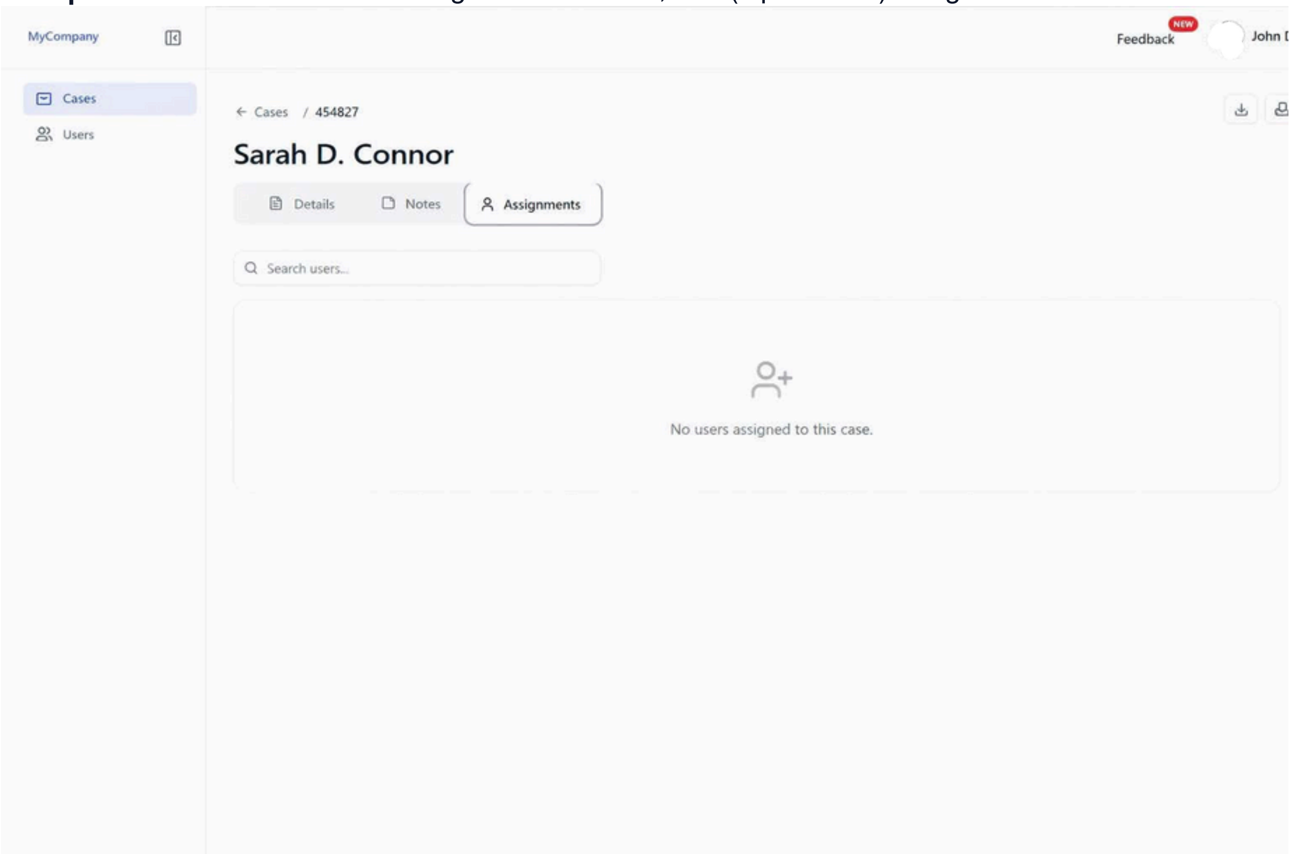

Figure 5. Assignments tab showing user search and an empty state when no users are assigned.

6. Standards and Templates

Consistentdataentryimprovesreportingandreduces rework.

6.1 Note writing standard

Write notes so that someone reading later can understand what happened, when, and how it was verified.

Recommended note format

Outcome - what changed orwas confirmed. **Source** - where the information came from. **Next step** - if any action is required.

Examples

- **Confirmedanswer filed withcourt.** Source: court portal. Next: upload to SharePoint.
- **NOA received and saved.** Source: vendor email. Next: verify docket entry.
- **Service date updated to Jan 5, 2026.** Source: filed proof of service. Next: recalc answer due date.

6.2 Case identifier formatting

- Use the exact formatting shown in the source (including hyphens).
- Avoid extra spaces; copy/paste where possible.
- If the court case number has a prefix, keep it (example: CV-2025-12-6033).

7. Troubleshooting

Common issues and how to resolve them.

I cannot see the Users menu

- This is expected for non-admin roles (Org User, Vendor User).
- Confirm your assigned role with a Vendor Admin or system administrator.

Search returns no results

- Try a different identifier (Case ID or Court Case Number).
- Check for typos and remove extra spaces.
- Confirm you have permission for the vendor scope (Vendor roles cannot see other vendors).

I cannot create a note or assignment

- Your role may be view-only for that function.
- Confirm whether Notes/Assignments are enabled for your role in this deployment.

Export is missing rows

- Exports usually reflect the current filters and pagination.
- Clear filters and export again if you need a full list.
- Confirm whether the export includes only visible columns.

8. Glossary

Case ID: Internalidentifier for the case record in the portal.

Court Case Number: Court-issued docket/case number; often the most reliable search key.

Vendor scope: Theset of cases and users tied to a specific vendor. Vendor roles are restricted to their scope.

Active Status: User or case is currently active/accessible in the portal