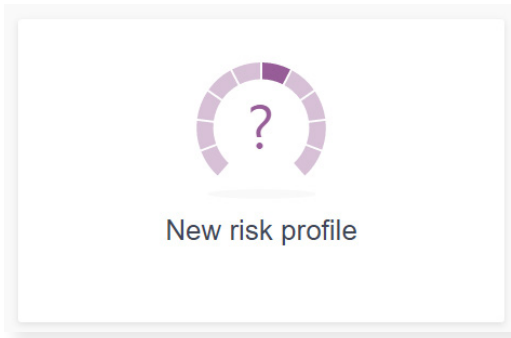




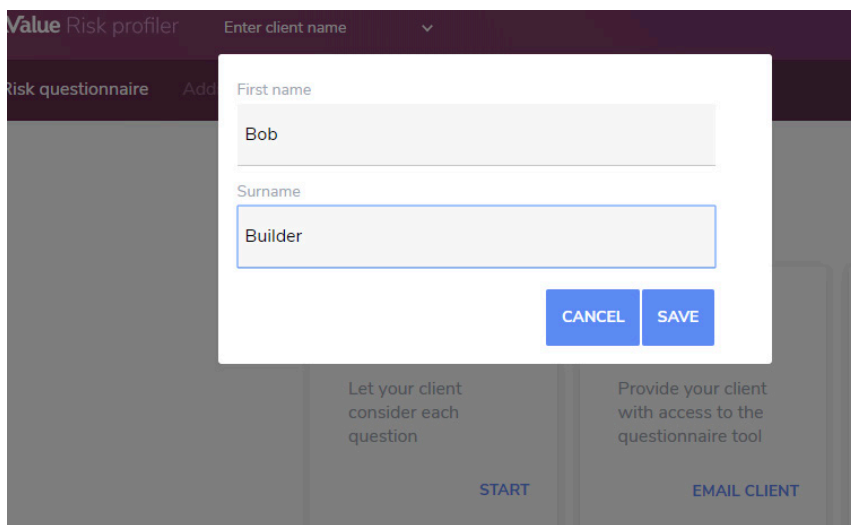
Adding or amending case names

Risk Profiler

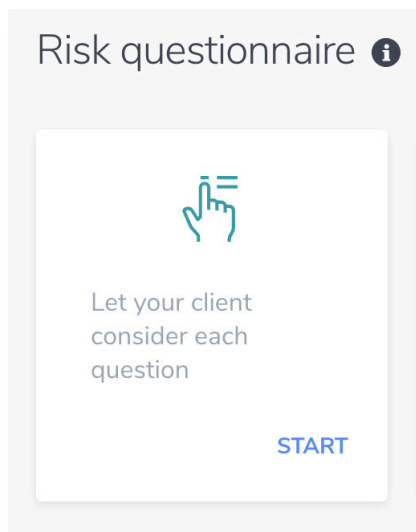
Login and select New risk profile:



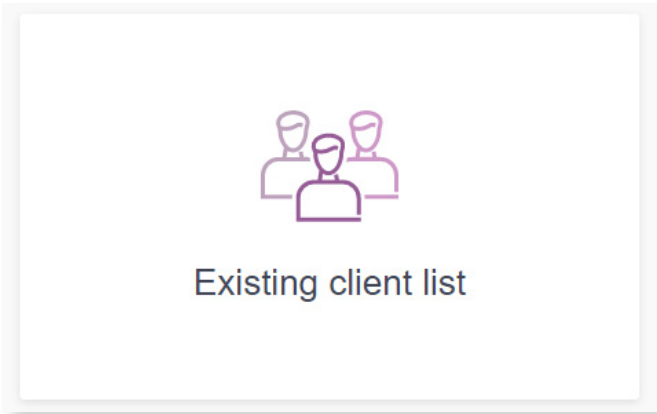
Go to the top of the next screen and select the drop down arrow next to client name. In the pop up box, enter the client's name and click Save.



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.prox				New client		No
Case 11-Feb-2020 16:20	testteam.prox				New client		No
Case 06-Feb-2020 13:57	testteam.prox				New client		No
Case 09-Dec-2019 13:48	testteam.prox				New client		No
Case 06-Feb-2020 13:56	testteam.prox				New client		No
Case 02-Dec-2019 16:52	testteam.prox				New client		No
Case 09-Dec-2019 13:54	testteam.prox				New client		No
Case 09-Dec-2019 13:56	testteam.prox				New client		No

Select the required case:

Case 06-Feb-2020 13:56	tes
Case 02-Dec-2019 16:52	tes
Case 09-Dec-2019 13:54	tes

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'

The image shows a pop-up form titled 'Case 02-Dec-2019 1652' with a dropdown arrow. It contains two text input fields. The first field is labeled 'First name' and contains the text 'Add'. The second field is labeled 'Surname' and contains the text 'Name'. At the bottom right of the form are two blue buttons labeled 'CANCEL' and 'SAVE'.

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

