Case Statuses

Case Statuses

Purpose and when to use this record

Maintain the controlled case statuses used to communicate investigative or administrative progress.

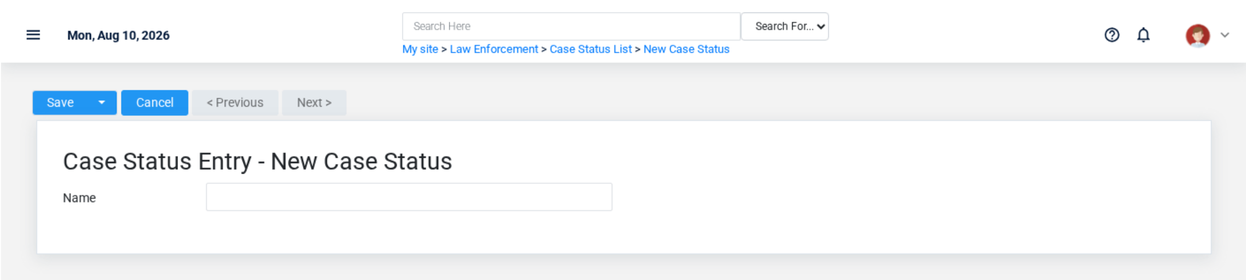
At a glance

- **Identify it by: Name**.
- **Why care:** Use the agency's approved terminology and access policy. Preserve dates, responsible personnel, case links, and audit history because these records may support official reporting or custody review.

Before you begin

You need the Brisk permission for the action you are taking on case statuses. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a Case Status



The Case Statuses create screen in the Brisk documentation demo.

Create a Case Status only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first.
2. Enter the required identifying and operational values: **Name**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Case Status, then confirm **Name** on its detail page before continuing.

After saving: Open **Cases** and confirm the Case Status appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Case Status

Delete this Case Status only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Cases**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Case Statuses list and make sure only the intended Case Status was removed.

Review Case Status details

Use the detail page as the shared record of what this Case Status currently means. Verify **Name** before relying on it for a decision.

Compare the Case Status with its source document or approved setup request before deciding that it needs correction.

Next check: Open **Cases** and confirm the Case Status appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

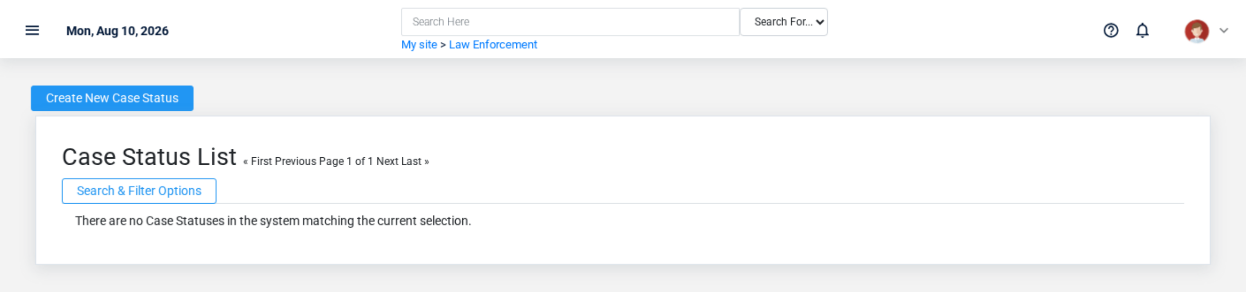
Edit an existing Case Status

Edit this Case Status when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change case history, custody, dispatch, official reporting, or audit review.
3. Save the change, return to the list, and confirm that the Case Status now appears under the expected **Name**.

After the change: Open **Cases** and confirm the Case Status appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review case statuses



The Case Statuses list screen in the Brisk documentation demo.

Use the Case Statuses list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

Open the Case Status whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 1 user-relevant fields for this Case Status, including 0 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Sets the name of this status.

What happens next

Open **Cases** and confirm the Case Status appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this Case Status with the source document or approved setup decision, then check the downstream screen where it is used.

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